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Ontario's Tourism Industry

Opportunity—Progress—Innovation

THE REPORT OF THE ADVISORY COMMITTEE
ON A TOURISM STRATEGY FOR THE PROVINCE
OF ONTARIO

To the Minister of Culture, Tourism and Recreation

February 1994

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Jim Kehoe
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Ian McMillan
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Frank Prouse
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- J. C. Santos
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Introduction By The Chair

TOURISM IN ONTARIO HAS BEEN UNDERGOING SIGNIFICANT CHANGE as a result of long-term shifts in travel patterns and the impact of the recession. Major restructuring in Ontario's economy has made this a particularly difficult time for many areas of the tourism industry. For these reasons the Ontario government — through its Industrial Policy Framework — brought together industry leaders in an Advisory Committee to develop a tourism strategy to improve industry competitiveness. The result is this document.

Ontario's tourism industry has devised this strategy to:

- reposition the industry to respond to domestic and international competition;
- facilitate the successful restructuring of the industry in order to increase levels of employment in well-paid, high value-added tourism jobs;
- redesign the tourism industry's offerings with higher quality and value for the customer to respond to and meet the constantly changing needs of tourists, to improve our share of a growing worldwide tourism market, and to create a growing tourism market in Ontario; and
- maintain and enhance the quality of Ontario life and landscapes through well planned and managed tourism development.

In May 1992, a Tourism Forum brought together 200 delegates from various sectors of the Ontario tourism industry as well as government, media, and trade associations. The Forum outlined a number of challenges in the industry and identified some possible solutions. Areas of concern included the need for a new dynamic vision for the tourism industry, improved customer service, new focused packaging of products, co-ordinated marketing, and improved distribution of research and analysis on current and

potential markets. The Forum provided a strong beginning and a solid foundation for development of this sectoral strategy.

The Minister's Advisory Committee, through consultation with industry, has identified key issues, a vision, goals, strategies, objectives, and action plans with recommendations for implementation that will strengthen the industry. Both short- and long-term action plans are identified.

The Committee used current subsectoral, policy and area tourism studies to support an industry-led analysis of the strengths and weaknesses of the tourism sector. Studies covering a range of tourism sub-sectors, including festivals and events, attractions, golf, resorts and accommodations, recreational boating, corporate meetings, cultural tourism, rural tourism, and incentive travel, as well as geographical areas such as Northern Ontario and Metro Toronto, provided supporting data for the strategy.

In our analysis of the industry we also considered analytical models and studies, including models of the economic impact of tourism in Ontario and in specific regions, a tourism industry and labour force profile, travel market surveys, and reports on Ontario visitor trends, tourism competitiveness and taxation, travel price/value perceptions, and tourism technology.

The key to this strategy lies in increased industry co-operation and co-ordination. Fundamental to our future success is a vision with supporting goals, strategies, and objectives to help bring the tourism industry together as a sustained partnership among stakeholders. A vision is not enough, however, so the strategy also outlines four priorities for industry and the provincial government:

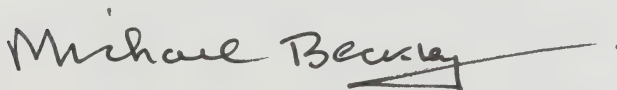
- Putting in place a winning tourism marketing strategy
- Building the essential capability to deliver a high-quality tourism experience
- Raising the industry profile
- Strengthening the key industry organizations

Specific objectives, action plans and recommendations for how the industry should address these issues were developed by industry working groups. This activity was complemented by three rounds of regional consultations, in communities across Ontario, to plot the path that Ontario's tourism industry must take to survive and thrive. The Advisory Committee also incorporated ideas and suggestions received from tourism business owners and operators through letters, faxes and telephone conversations. In the end, more than 500 people from all over the industry contributed to the process and guided the direction of this document.

The strategy represents a starting point for the industry. When implemented, it will begin the process of repositioning tourism in Ontario and creating a more effective long-term partnership among industry, labour and government. As the strategy vision is realized, helping the economy to grow and expand, new opportunities, challenges and initiatives will arise as the industry evolves. This will be the true test of this strategy and of the industry's ability to lead Ontario into the next millennium.

I thank the members of the Minister's Advisory Committee, as well as the various working groups, committees and participants at regional meetings, for investing their time, effort, knowledge and foresight in the strategy. I would also like to thank the Ministry of Culture, Tourism and Recreation for their support and assistance.

Yours sincerely,

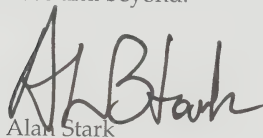
A handwritten signature in black ink that reads "Michael Beckley". The signature is fluid and cursive, with a long horizontal line extending from the end of the name.

Michael Beckley
President
Commonwealth Hospitality Limited
and
Chair, Minister's Advisory Committee
Tourism Sectoral Strategy

Message From The Vice Chairs

THE FOLLOWING STRATEGY EVOLVED over the past seven months through a process that involved more than 500 industry participants, contributing countless hours of their time, effort and expertise. The result is a document that we believe will position Ontario's tourism industry as a leading contributor to the provincial economy. The goals, strategies, objectives, action plans, and recommendations that were developed reflect our industry's perception of where we are coming from, where we need to be and how we will get there.

We would like to thank everyone who committed themselves to the process and look forward to the challenge of realizing the strategy vision and beginning the industry's progression into the year 2000 and beyond.



Alan Stark

President and General Manager, Amex Canada Inc.

and

Vice Chair, Industry Sectors Committee

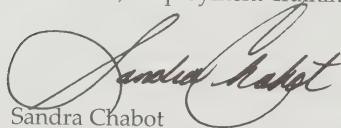


Ethel LaValley

Vice President, Ontario Federation of Labour

and

Vice Chair, Employment Training and Service Delivery



Sandra Chabot

Chair, Association of Ontario Regional Travel Associations

and

Vice Chair, Regional Committees

Executive Summary

THE TOURISM INDUSTRY, with the assistance of the Ministry of Culture, Tourism and Recreation, has developed an industrial strategy for the Ontario tourism industry. Building on recent industry consultations, and in light of changing economic conditions in the province, the strategy is offered to reposition tourism in Ontario and improve the industry's competitiveness.

Tourism is the largest and fastest growing industry in the world. Ontario has been losing market share over the past decade, however, and now faces a travel deficit of close to \$4 billion.

A fundamental issue facing the industry is how to co-ordinate its efforts without inhibiting healthy competition. New partnerships and strategic alliances have to be developed to focus our investment strategically for the benefit of the industry. We must focus on our shared interests and work together to revitalize tourism in this province.

The first step in developing this strategy was determining the most important issues that needed to be addressed.

KEY ISSUES

1. More effective marketing, product development, packaging and funding are needed.
2. We need to improve the perception of value, especially in the domestic market, responding to the expectations of more demanding, discerning customers.
3. Ontario's image as a special tourism destination must be strengthened if the industry is to survive and thrive in the face of intensified worldwide competition.
4. Government fiscal and regulatory policy and legislative issues that can be barriers to industry growth need to be resolved.

5. Recognition of the economic importance of tourism is lacking; we need to develop an appropriate profile for the industry among key decision makers and opinion leaders.
6. A common vision, leadership, and integrated industry approaches are needed to reduce duplication of effort and increase partnerships.
7. We need to improve professional management, skills and the quality of service delivery at all levels within the industry.
8. Improved access to capital from financial institutions is needed.

The second step in the strategy development process involved creating a vision, goals, strategies, and objectives for the industry that would help the industry coalesce and begin to work in a more coordinated fashion. The following vision was developed by the industry to guide itself immediately and throughout the next decade.

THE VISION

ONTARIO, CANADA, WILL BECOME A LEADING DESTINATION FOR TARGETED DOMESTIC, U.S., AND INTERNATIONAL VISITORS THROUGH A REVITALIZATION OF ITS TOURISM INDUSTRY AND THE WAY IT DOES BUSINESS.

To address the key issues and vision, the industry focused its efforts on the following areas:

- Marketing and Product Development
- Regulations and Taxation
- Human Resources Development
- Infrastructure
- Tourism Sector Communications
- Organization and Funding

Accordingly, six goals were identified by the industry to support the vision. The chart on page 10 shows the vision and goals for the strategy. This approach to developing tourism in Ontario is essential to increasing market share. The industry believes that increased co-operation within the sector through the strategy will help reduce Ontario's growing travel deficit.

The strategy document outlines a comprehensive approach to improving the industry's competitive positioning.

In each key area, the Advisory Committee has laid out action plans outlining specific steps to be followed by industry and government in effective partnerships.

Perhaps the most important aspects of the strategy are the potential results in increasing the number of visitors, their length of stay, and the amount they spend, and improving the economic health of the province. The Advisory Committee established the following performance objectives.

THE PERFORMANCE OBJECTIVES

BY THE YEAR 2000, the tourism industry in Ontario will achieve leading levels of growth, specifically by:

- attracting 15 million more visitors – an increase in the number of visitors to Ontario from 159 million to 174 million;
- generating approximately \$6 billion more from visitor spending to a new revenue level of \$23 billion (1991 dollars);
- achieving clear recognition as one of the top industries in Ontario's economy.

ONTARIO TOURISM STRATEGY VISION, GOALS AND DIRECTIONS

Ontario, Canada, will become a leading destination for targeted domestic, U.S., and international visitors through a revitalization of its tourism industry and the way it does business.

"Putting in Place a Winning Marketing Strategy"		"Developing a High Quality Tourism Experience"	"Raising the Industry Profile"	"Developing Key Industry Organizations"
Achieve Leading Levels of Tourism Growth	Develop a Work Force that Exceeds Visitors' Service Expectations	Strengthen Key Tourism Infrastructure	Shape the Policy and Tax Environment to Generate Industry Growth	Implement an Organizational Structure to Improve Co-ordination
Brand and position Ontario in the market	Implement province-wide customer service training and awards program	Improve linkages between modes of transportation for tourists	Review existing tax measures	Establish a tourism council for Ontario
Become a niche market leader	Establish industry-supported occupational standards	Develop Pearson International Airport as a North American gateway	Promote environmental legislation that will enhance tourism growth and sustainability	Establish a new provincial tourism marketing organization
Promote internationally recognized products	Improve awareness of career opportunities in tourism	Improve infrastructure in gateway cities to improve 'sense of arrival'	Implement northern resource-based tourism policy	Broaden industry support of the Ontario Tourism Education Council
Attract major sports and cultural events	Develop an integrated tourism education and training system	Implement new tourism highway signage system	Promote legislation that supports unique characteristics of tourism workers	Establish a single effective industry advocacy organization
Market Toronto and other gateway cities		Expand network of information centres		Develop an effective regional structure connected to these organizations
Implement product classification and grading system		Expand convention and Congress facilities in Toronto and Ottawa		
Implement provincial tourist information services using advanced technology		Identify potential of government tourism-related agencies to improve tourism		

Chapter 1

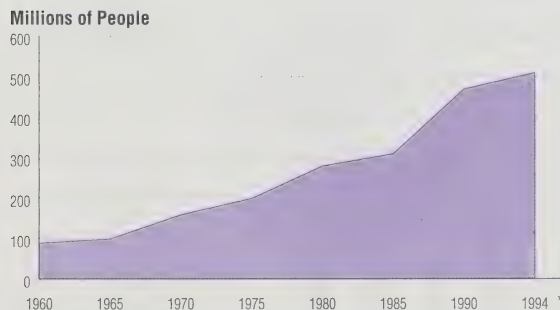
Realizing the Economic Potential of Tourism

A GROWING WORLD MARKET

TOURISM IS THE WORLD'S LARGEST INDUSTRY. International tourism arrivals are expected to increase to 515 million by 1994 (Exhibit 1.1).

The most recent report of the World Travel and Tourism Council estimates that tourism now accounts for 10.1 per cent of the world's gross domestic product and employs one worker in every nine. It also represents 10.7 per cent of global capital investment and 10.9 per cent of worldwide consumer spending (WTTC 1994).

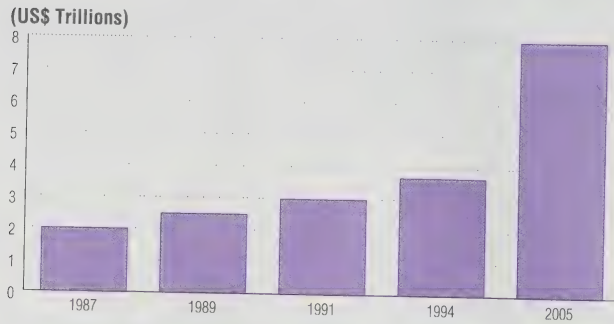
Exhibit 1-1 World Tourism Growth,
1960-1994 International Tourism Arrivals



* Provisional revised estimates for 1994. **Source:** The Big Picture, 1992-1993, WTTC, 1993.

By 2005, tourism is expected to more than double its current gross output to \$7.9 trillion; generate 90 per cent more jobs; almost triple its capital investment to \$1.7 trillion; and attract more than twice the current level of consumer spending, for a total of \$4.6 trillion (Exhibit 1-2).

Exhibit 1-2 Tourism Gross Output – Worldwide



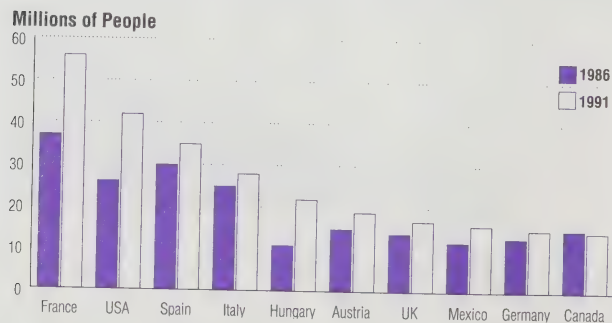
* **Tourism Spending:** Includes households, business, and government trip spending. **Source:** WTTC, 1993.

The global tourism industry is characterized by rapid growth in developing regions and mature growth in many North American and European markets.

Despite this positive outlook worldwide, Canada's position in international tourism has fallen from sixth place in 1986 to tenth in 1991 (Exhibit 1.3). Canada is the only country of the top ten tourism destinations to experience a decline in arrivals.

Exhibit 1-3 World's Top Tourism Destinations

International Tourism Arrivals (Excluding Excursionists*)



* An excursionist is a same-day visitor. **Source:** World Tourism Organization.

Canada's share of international tourism receipts has declined as well – where the industry ranked ninth in 1986, it was tenth in 1991, even though tourist receipts increased over this period from

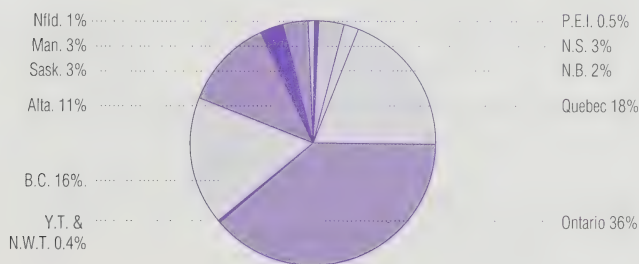
\$5.4 billion to \$6.5 billion. Overall, Canada's market share fell slightly between 1986 and 1991, from 2.78 per cent to 2.25 per cent of the global total. Ontario's share of international tourism receipts started to decline after 1983 from 1.25 per cent to 0.97 per cent in 1991. This occurred even though Ontario's international receipts almost doubled from \$1.517 to \$2.888 billion during the same period.

One reason for this decline in market share is that Ontario has not been able to take advantage of growing tourism demand. Other destinations have been more successful in capitalizing on the growing demand by catering to tourists' interests and expectations.

TOURISM IN ONTARIO

ONTARIO HAS THE LARGEST PROVINCIAL TOURISM INDUSTRY IN CANADA. Ontario accounts for 36 per cent of national tourism revenues (Exhibit 1.4) and is the predominant gateway to Canada (Exhibit 1.5). In 1992, Ontario received 66 per cent of the U.S. visitors to Canada and 53 per cent of overseas visitors.

Exhibit 1-4 Shares of Canada's \$26-Billion Tourism Receipts

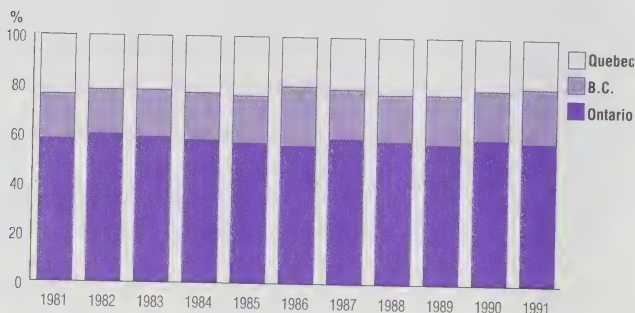


Note: Provincial tourism receipts do not add up to Canada's total because of the exclusion of expenditure items that are not allocatable among the provinces (e.g., international transportation fares and crew spending and spending by Canadians on trips with not-stated destinations).

Sources: Tourism Canada; Tourism Impact System: Statistics Canada, Intl. Travel, cat. 201, 1990.

Exhibit 1-5 Ontario is the #1 Gateway to Canada

% Share* of Travellers through Canada's Three Main Tourism Gateways



* Overnight travellers from the U.S.* and overseas to Canada. Source: Statistics Canada; International Travel Survey.

Tourism is a major industry within the Ontario economy (Exhibit 1.6). Tourism activities span all parts of the province, and in many centres tourism is one of the most important industries. It is also an industry made up primarily of entrepreneurs. While there are a number of major companies, tourism is predominantly an industry of small businesses run by people who have staked their livelihoods on the success of their operations.

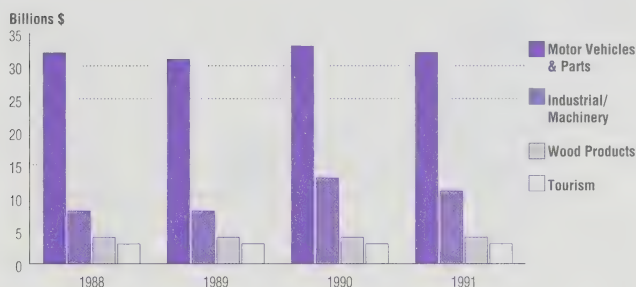
Exhibit 1-6 Gross Domestic Product By Industry-Ontario, 1991

Industry	% of Provincial GDP (\$197 billion in 1986 constant \$)	Rank
Community, Business and Personal Service	23.5%	1
Manufacturing	22.7%	2
Finance, Insurance and Real Estate	18.2%	3
Wholesale and Retail Trade	10.8%	4
Transportation and Communication	7.2%	5
Public Administration and Defence	6.2%	6
Construction	5.5%	7
Tourism*	3.1%	8
Utilities	2.9%	9
Other Primary	1.5%	10
Agriculture	1.4%	11

* Tourism includes a percentage of other sectors, for example, here tourism incorporates a portion of: community, business and personal service, wholesale and retail trade, transportation and communication, and construction.
Source: Economic Forecast, The Conference Board of Canada, Provincial Outlook, Summer 1992.

Ontario's tourism industry is the province's fourth largest export (Exhibit 1.7). Tourism is a traded industry attracting vital export earnings through the visits of tourists from the United States and overseas. As Ontario looks ahead to growing foreign tourism spending, it must also look to the tourism industry to pursue these trade opportunities and improve its position as an exporter.

Exhibit 1-7 Top Four Exports Ontario 1988-91



Source: MCTR and Statistics Canada.

Tourism is about jobs. There are over 272,000 jobs in tourism's primary subsectors (Exhibit 1.8) and it is one of the top employers in Ontario, representing 6.6 per cent of Ontario's total employment (Exhibit 1.9).

Exhibit 1-8 Direct Tourism Employment and Expenditures in Ontario (1991)*

Accommodation employs the most people; Food and Beverage generates the highest level of expenditures

	Direct Employment Jobs	Expenditures (Millions of Dollars)
Accommodation	77,826	\$2,417
Food & Beverage	37,842	\$4,981
Public Transportation	39,700	\$2,434
Auto	13,280	\$2,576
Recreation	61,118	\$1,901
Retail	42,554	\$2,578
Total	272,320	\$16,887
	jobs	million

* Tourism components factored out of statistics for total subsectors.

Source: MCTR, MTR 12 model.

Exhibit 1-9 Top Employers By Industry-Ontario, 1990

Industry	Rank
Community, Business and Personal Service	1
Manufacturing	2
Wholesale and Retail Trade	3
Transportation and Communication	4
Finance, Insurance and Real Estate	5
Construction	6
Public Administration and Defence	7
Tourism	8

Source: Statistics Canada, Cat. #71-220, annual averages 1990.

Tourism has a unique role in the province's employment picture. It is an industry that responds quickly to economic activity – as the economy improves, new jobs will be created in tourism. It also creates a large number of jobs for racial minorities, Aboriginal people, new Canadians, and women (Exhibit 1.10). For many, tourism provides a training and development foundation that leads to more employment opportunities in other industries, as well as in tourism.

Exhibit 1-10 Employment Profile for 1986

Labour Force's** Share	Racial Minorities	Aboriginal People	Immigrants*	Women	French Mother Tongue	Total Labour Force
All Industries in Ontario	8.5%	1.4%	27.1%	43.9%	4.7%	4,860,375
Accommodation	12.0%	2.7%	31.1%	59.7%	4.8%	66,775
Food & Beverage	13.2%	1.6%	28.7%	59.2%	3.7%	212,605
Amusement/Recreation	5.1%	1.8%	17.7%	44.2%	2.8%	49,025

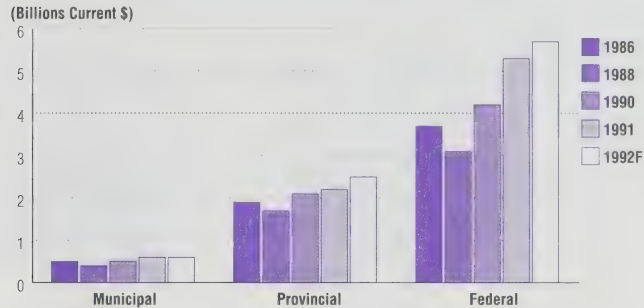
* Immigrant is defined as any person not a Canadian citizen by birth. ** Labour Force here refers to experienced labour force which includes persons who were employed during the census reference week or who were unemployed but had been unemployed at sometime since January 1, 1985. Excluded are new seekers, who are looking for work but never worked or had last worked prior to January 1, 1985.

Source: StatsCan, 1986.

Tourism also has a major revenue impact and is a substantial and growing contributor to the tax base (Exhibit 1.11).

Exhibit 1-11 Tourism Contributes to Ontario's Tax Base

Taxes generated by tourism expenditures



F = Forecasted. Source: MCTR, MTR 12 model.

Tourism is usually defined through its primary subsectors – accommodation; food and beverage; transportation industries/services; amusement and recreation services; attractions; events and conferences; travel trade; tourism retail, services and products. In addition to these, many other businesses are related to tourism (Exhibit 1.12). Because of the spin-off effects for other businesses, investment in tourism generates up to two and a half times that amount in real dollars, according to the World Travel and Tourism Council.

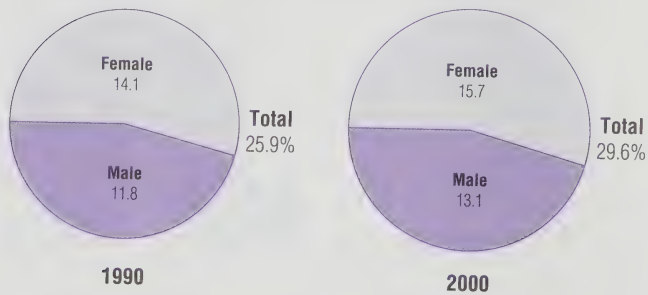
Exhibit 1-12 The Broad Structure of the Tourism Industry



CHANGING CONSUMERS

POPULATION DEMOGRAPHICS ARE CHANGING. By the year 2000, people aged 50 and over will account for nearly 30 per cent of Ontario's population. (Exhibit 1.13).

Exhibit 1-13 % Population Over 50 in Ontario



Ministry of Treasury & Economics, Ontario Population Projections to 2015, June 1991.

Consumer demands are changing. Tourists' interests are shifting from escapism to enrichment. Demographic, socio-economic, lifestyle, travel and institutional trends have had a major impact on what is important in making travel plans (Exhibit 1.14). There is a clear trend to neo-traditional values as people seek to balance family, work and leisure pursuits. Substance and reliability are strong consumer values. More and more, consumers are:

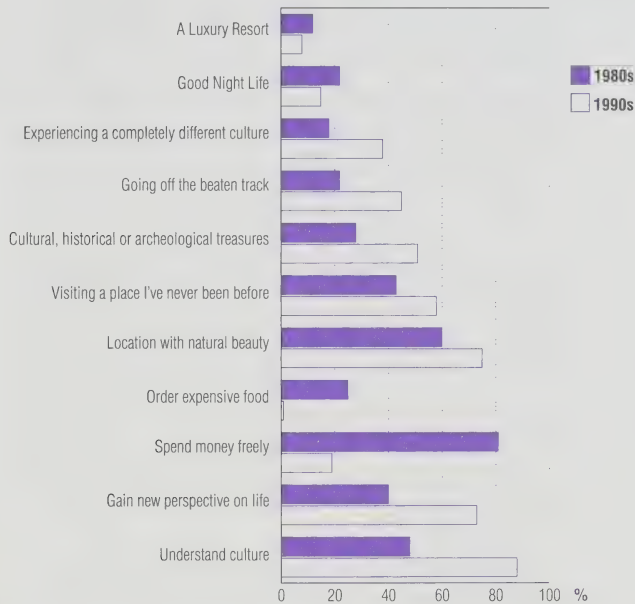
- becoming very price/bargain sensitive,
- seeking "sales" to stretch dollars,
- working down debt levels,
- putting less importance on discretionary items.

Lifestyles and choices are being dictated by time constraints. Products and services that reduce time and planning will have continuing appeal. Key factors for consumers are safety, convenience and assurance of pleasurable experiences. Tourists' interests and travel motivations are also becoming more specialized and more sophisticated, reflecting demographic changes in households, increased education and fewer children. In particular, con-

sumers are seeking value, which can be defined as exceeding a customer's expectations. Tourism faces the challenge of continuously creating value; that is, thoroughly understanding the relationship between the product and the price from a value perspective.

Exhibit 1-14 Shift From Escapism to Enrichment

An example of changing trends. What is very important when planning trips?



Source: Lou Harris Poll for Travel & Leisure Magazine 1992.

IMPACT OF INFORMATION TECHNOLOGY

THE COMPETITIVE POSITION OF TOURISM BUSINESSES is being affected by the rate at which certain technological changes are being diffused in local tourism facilities. Technological changes affect the productivity of capital and labour, product quality, distribution networks

and consumer services. Vertical and horizontal integration of tourism suppliers, made possible by technology, places smaller operators at a competitive disadvantage relative to the international market.

The role of technology is also shifting, however, from increasing efficiencies in services and operations to identifying and creating new markets and products. Diagonal integration describes a new pattern of linkages among tourism businesses, enabled by the development of computer technology, electronic networks and data bases. The benefit for travellers is access to an expanded range of services and travel activities through a single distribution system. For example, computer reservation systems (CRSs) have emerged as a major strategic asset for international tourism (e.g., 68 per cent of U.S. car rentals and more than 50 per cent of hotel reservations are now made through CRSs).

Research indicates that Ontario may be falling behind other jurisdictions in adopting technology and integrating small and medium-sized enterprises (SMEs) with global electronic distribution systems. Tourism therefore offers opportunities for Ontario's telecommunications industry to grow and expand. By working together to develop new, efficient and innovative ways of relaying information between customers and businesses, both sectors would benefit.

Technological innovations require a highly trained work force. At present, however, staff in most tourism businesses are not sufficiently skilled in technology. By improving the skills level of the tourism work force, Ontario will be better able to position itself as leader in the tourism information field, allowing it to compete globally.

ENVIRONMENTAL ISSUES

TOURISM DEVELOPMENT STRATEGIES are shifting in some regions from the objective of simply attracting more travellers to planning for sustainable growth. For example, by preserving indigenous cul-

tures and environments and by managing development to respect carrying capacity and demand targets. Carrying capacity is defined by the social and environmental limitations to growth that will ensure sustainability while accommodating industry growth targets.

The Ontario tourism industry recognizes the importance of Ontario's natural resources to its tourism products and of maintaining its natural and built assets. Steps must be taken to ensure the sustainability of these crucial resources. This industry can play a leading role in Ontario's future while ensuring the recognition of broader social issues such as Aboriginal land claims.

SOCIAL ISSUES

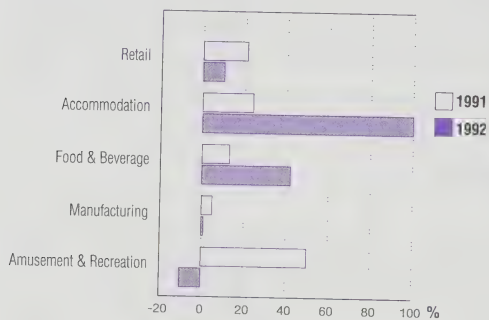
TOURISM HAS SOCIAL IMPORTANCE AS A VEHICLE for development of cross-cultural relations and personal growth. Working together with the province's cultural industries, tourism can serve as a catalyst for the promotion of Ontario's history and its cultural and ethnic diversity. Tourism can also work to ensure the preservation of our cultural resources. Encouraging strong community participation in heritage activities and staging festivals and events bring benefits to the entire province. By positioning Ontario as an attractive tourism destination, the industry will attract investment to the province for a wide range of activities. There are also significant opportunities for the First Nations to participate in the industry in ways that respect their unique history and culture.

INDUSTRY RESTRUCTURING

SIGNIFICANT RESTRUCTURING IS TAKING PLACE IN TOURISM, driven in large part by the global recession and increasing financial uncertainty. It is also a reflection of the competitive strength and positioning of the industry's subsectors and their inability to adapt to changes in tourism markets. The costs of financial failures

(Exhibit 1.15) and unemployment have been severe for an industry that is made up primarily of small operations. Tourism is more than just a business – it's a way of life in which the high percentage of small owner-operated businesses often puts individuals in direct financial risk. Major restructuring will need to continue, however, for the industry to be able to compete internationally.

Exhibit 1-15 % Change of Bankruptcies in Selected Sectors in Ontario



Source: Consumer & Corporate Affairs Canada.

In summary, circumstances are reshaping the future of travel and tourism. As Ontario looks ahead, the tourism industry must be recognized for the economic opportunities it offers for the province. This potential is too important to ignore. The challenges must be faced and resolved so that new levels of value can be created, greater trade benefits realized, environmental and social progress made, and new employment levels reached. Tourism must become one of the top industries in Ontario's economy. The remainder of this report presents a tourism strategy for Ontario and charts a course to realize this important dimension of Ontario's future.

Chapter 2

Setting the Tourism Vision and the Challenge

THE CRITICAL STRATEGIC ISSUES facing Ontario's tourism industry were identified at a very early stage in our consultation process. For many, identifying the issues seemed to have been a recurrent activity of recent years; resolving them would prove to be more difficult. Tourism development exercises have taken place and are continuing at all levels in the industry — the most recent was the Tourism Forum of May 1992. Agreement was reached early in our strategy development process on the key issues. At the same time, however, we found deep-seated scepticism that the agenda for change might not be developed in the form of action-oriented results. Nevertheless, the industry very openly and responsibly set forth the challenges it faces and the needs that must be addressed:

- More effective marketing, product development, packaging and funding are needed
- We need to improve the perception of value, especially in the domestic market, responding to the expectations of more demanding, discerning customers.
- Ontario's image as a special tourism destination must be strengthened if the industry is to survive in the face of intensified worldwide competition.
- Government fiscal and regulatory policy and legislative issues that can be barriers to industry growth need to be resolved.
- Recognition of the economic importance of tourism is lacking; we need to develop an appropriate profile for the industry among key decision makers and opinion leaders.

- A common vision, leadership, and integrated industry approaches are needed to reduce duplication of effort and increase partnerships.
- We need to improve professional management, skills and the quality of service delivery at all levels within the industry.
- Improved access to capital from financial institutions is needed.

The tourism industry recognizes fully that these issues must be addressed if the industry is to realize its full potential. The consultations also made it clear that the challenges will not be overcome through fine tuning. Fundamental changes must be made in the way the industry conducts business. A new vision that recognizes this challenge and that charts a demanding and rewarding course for the future must be set. To this end, our consultations have established the following vision:

The Vision

ONTARIO, CANADA, WILL BECOME A LEADING DESTINATION FOR TARGETED DOMESTIC, U.S., AND INTERNATIONAL VISITORS THROUGH A REVITALIZATION OF ITS TOURISM INDUSTRY AND THE WAY IT DOES BUSINESS.

This vision has been translated into specific measures that set out what a revitalized tourism industry can accomplish in achieving a new level of industry performance.

The Performance Objectives

By the year 2000 the tourism industry in Ontario will achieve leading levels of growth, specifically by:

- attracting 15 million more visitors — an increase in the number of visitors to Ontario from 159 million to 174 million;
- generating approximately \$6 billion more from visitor spending, to a new revenue level of \$23 billion (1991 dollars)
- achieving clear recognition as one of the top industries in Ontario's economy.

To ensure that the industry thrives in a growing world market, specific actions must be taken. Strategies must be developed to substantially increase the number of visitors from the U.S. and overseas, as well as from other provinces, and steps must be taken to improve the nature of the tourism experience. Taken together, the following key result indicators describe an exciting tourism industry characterized by an increasing sense of value, a vigorous level of activity, and an improved position in international trade.

TARGETS FOR THE YEAR 2000:

Visitor Mix

	Existing	1997	2000
Ontarians	83% (131 m)	81% (132.7 m)	78% (135.5 m)
United States	14% (22.4 m)	15% (24.4 m)	17% (29.6 m)
Other Countries	1% (1.7 m)	1% (2.3 m)	2% (3.5 m)
Other Provinces	2% (3.7 m)	3% (4.3 m)	3% (5.2 m)

Revenue Mix

	Existing	1997	2000
Ontarians	75% (\$12.8 b)	72% (\$14 b)	67% (\$15.4 b)
United States	13% (\$2.2 b)	14% (\$2.7 b)	16% (\$3.7 b)
Other Countries	7% (\$1.2 b)	9% (\$1.8 b)	12% (\$2.7 b)
Other Provinces	5% (\$0.8 b)	5% (\$0.9 b)	5% (\$1.2 b)

Key Activity Levels by the Year 2000

- Increase the average length of stay in Ontario from one night to two by 2000 for Ontario and U.S. visitors.
- Increase the number of international arrivals to Pearson International Airport from 1 million to 1.8 million by 1997 and to 2.6 million by 2000.
- Increase the number of room nights occupied by 10% per annum.

Key Awareness Levels by the Year 2000

- Increase the awareness level of the economic importance and impact of tourism in Ontario in 50% of key audiences (opinion leaders and financial institutions) by 1997 and in 75% of key audiences by 2000.
- Increase the awareness level of Pearson International Airport as a gateway to North America in 50% of overseas visitors to Ontario by 1997 and in 75% of overseas visitors by 2000.

Travel Deficit

- Decrease the travel deficit from \$3.9 billion to \$2.5 billion by 1997 and to \$1 billion by 2000 (1991 dollars).

Employment Growth

- Create 100,000 new tourism jobs in Ontario, increasing the number of people employed in the industry from 272,000 to 322,000 by 1997 and to 372,000 by 2000.

The next chapters in this report take this vision and challenge for the industry and set out the goals, strategies, objectives and action plans that constitute a new tourism strategy for Ontario.

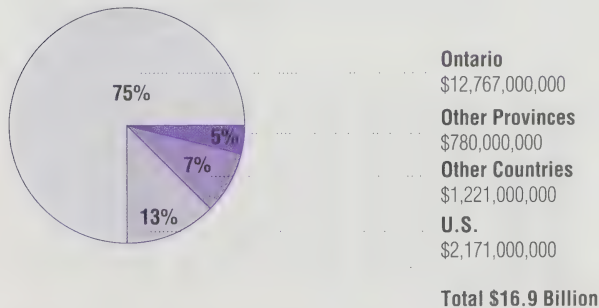
Chapter 3

Putting in Place a Winning Tourism Marketing Strategy

ONTARIO'S TOURISM INDUSTRY HAS BEEN LOSING MARKET SHARE in a growing world market. Ontario travellers represent 75 per cent of the tourism expenditures in Ontario (Exhibit 3.1). Although the size of this component of our tourism market fluctuates on an annual basis, it has shown a slight growth trend over the last 10 years (Exhibit 3.2). More and more, however, Ontarians are travelling to other tourism destinations rather than taking their vacations in Ontario (Exhibit 3.3), and the number of travellers from other parts of Canada has declined (Exhibit 3.4).

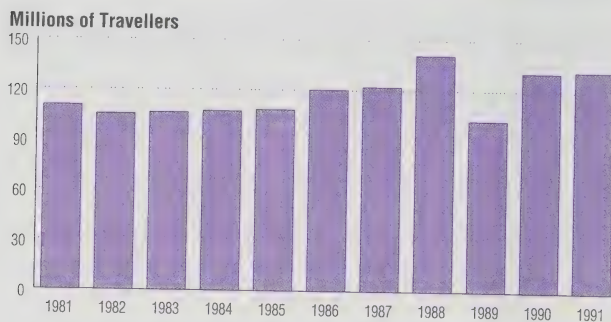
Exhibit 3-1 Expenditures by Travellers in Ontario by Origin 1991

(in Current \$)



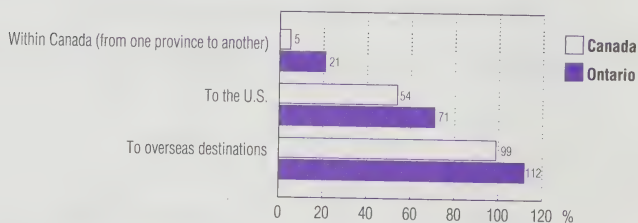
Source: MCTR Ontario Travel Monitor Survey Statistics Canada.

Exhibit 3-2 Number of Ontarians Travelling in Ontario

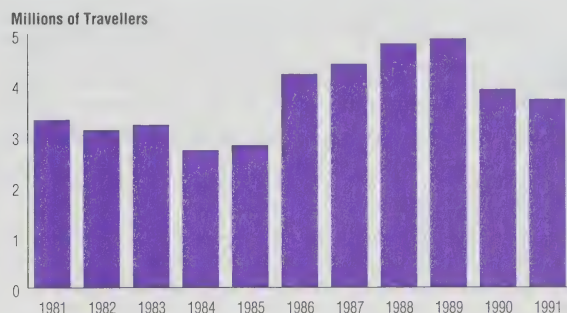


Source: MCTR Travel Monitor Survey, Statistics Canada.

Exhibit 3-3 Growth in Outbound Overnight Travel % Increase Between 1980-90

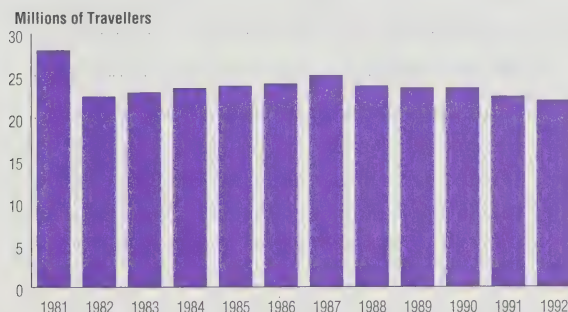


Source: US and Overseas, Statistics Canada. Travel between Canada and Other Countries Cat #66-202.

Exhibit 3-4 Number of Travellers in Ontario From Other Provinces

Source: MCTR Travel Monitor Survey, Statistics Canada.

Ontario's second major market is the United States. The border states — New York, Pennsylvania, Ohio, Michigan and Minnesota — account for 62 per cent of all U.S. travellers to Ontario. Since 1987, however, the number of U.S. visitors has declined steadily. (Exhibit 3.5).

Exhibit 3-5 Number of U.S. Travellers in Ontario

Source: Statistics Canada: International Travel Survey.

This comes at a time when U.S. domestic travel and travel abroad have increased substantially. About 90 per cent of U.S. travellers to Canada are return visitors. The number of first visits to Ontario is

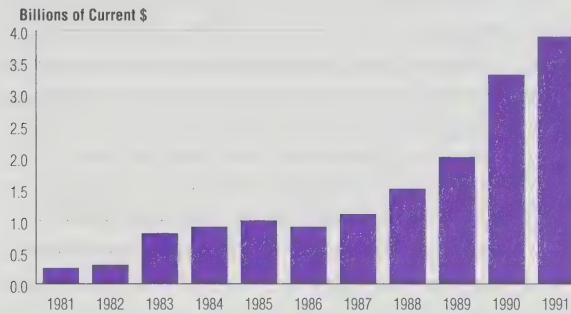
in decline, however, creating a diminishing pool of return-visit travellers. When combined with increased travel by border state residents within the United States, as well as the general population shift from northeastern to southwestern states, the result is a decline in the number of visits from our major international market. Ontario's top overseas markets for visitors and expenditures are the United Kingdom, Japan, Germany, France, Italy and Hong Kong. The number of overseas travellers to Ontario has been relatively flat since 1988 (Exhibit 3.6), even though international tourism in each of these markets grew over this period.

Exhibit 3-6 Number of Overseas Travellers in Ontario



Source: Statistics Canada.

The result is that Canada and Ontario have lost market share in international tourism. For example, Japanese arrivals to Canada have declined since peaking at 474,000 in 1990. Canada's share of the Japanese international tourism market declined from 4 per cent in 1989 to 3.3 per cent in 1992. The real economic significance of the decline in international visitors to Ontario, combined with the significant growth in Ontarians travelling outside the province, is shown in the international deficit on the travel account. This deficit nearly doubled between 1989 and 1991 (Exhibit 3.7) and is currently hovering around \$4 billion.

Exhibit 3-7 International Deficit on Travel Account

Source: Statistics Canada, Catalogue 66-201, and special tabs.

THE KEY MARKETING ISSUES AND OPPORTUNITIES

FUNDAMENTAL TO THE CURRENT PERFORMANCE of Ontario's tourism industry are several key marketing issues:

- **Lack of Clear Image** — Ontario lacks a clear image, especially internationally. The United States casts a deep, almost obliterating shadow over Ontario and Canada. Canada as a whole is thought of as vast, but empty and cold. To Europeans, Ontario is undefined; they're not sure whether Ontario is a northern state of the United States, a lake, or a Canadian city (Project Magnet 1992). Ontario must establish its own image, separate but complementary to Canada's and distinct from that of the United States.
- **Lack of Stable Enduring Marketing Initiatives** — There is a general lack of marketing co-ordination in Ontario's tourism industry. The many markets and the spectrum of products and experiences available create confusion for the consumer and the industry.

The marketing message for Ontario over the last ten years has been inconsistent. For example, slogans have changed from "Yours to Discover" to "Ontario Incredible" to "Take a Breather". In addition, Canada's marketing image at the federal level has not always been in tune with Ontario's marketing slogans and programs.

- **Declining Traditional Sources of Funding** — Fiscal constraints require the industry to work smarter, focus efforts and understand the market better. Declining government budgets and inadequate marketing budgets for tourism also dictate the need to work more closely with existing partners in both the public and the private sector as well as to seek new, non-traditional sources.

There has been a dramatic decrease in the financial resources allocated by government to marketing. As a result, public sector cost-sharing to publish promotional material has been phased out, international travel offices have been closed, and consumer advertising programs in Europe and Asia have been cancelled, as has the specialty marketing campaign in the United States. This has occurred despite the fact that internationally traded businesses offer a higher return on such investments.

Provincial budget reductions have resulted in fewer resources being allocated for tourism, particularly international markets. The provincial government budget allocation for tourism marketing programs (excluding administration and salaries) for the 1993/94 fiscal year was \$8.1 million. These funds were designated primarily for media buys and promotion. The comparable figure for 1990/91 was \$17.9 million.

By comparison, Quebec's Ministry of Tourism allocated \$22 million for its marketing programs (excluding administration and salaries) for the 1993/94 fiscal year.

- **Lack of Consumer Analysis** — In many cases, there is no strong link between consumer needs and tourism products. There is a need for comprehensive and updated knowledge of the tourism

industry, including both supply and demand components. Currently, supply- and demand-side research is conducted using different data bases and methods. Furthermore, data on regional tourism operations is not collected or organized consistently. Conflicting data issues must be resolved by adopting uniform standards wherever possible. Standardized or centrally co-ordinated data frameworks, definitions and collection procedures would provide a common basis for assessment.

Research should signal market shifts and product innovations. Improved competitive analysis is needed to assess Ontario's tourism industry against competitors' performance, to evaluate development proposals, and to position products in major markets.

Research must also be more accessible and, most important, well communicated. Requests indicate a burgeoning demand for easily understandable tourism data relevant to key market segments and industry trends.

NEW DIRECTIONS FOR GROWTH

WHILE THE INDUSTRY FACES A NUMBER OF CRITICAL ISSUES, there are also some significant opportunities that are a direct outgrowth of the many attractive strengths that Ontario offers.

- **Branding and Imaging** — Ontario needs to create awareness in the marketplace. Consumers need to be able to identify with Ontario's tourism products and destinations in order to ensure that their tourism decisions are based on a knowledge of the tremendous variety Ontario has to offer. Ontario's regional diversity also provides opportunities for the province to develop strong branding programs. The unique ability to cater to the tourists' specific needs and wants must be promoted. Long-term marketing programs that focus on creating consumer awareness are required to generate interest in tourism in Ontario.

- **Niches** — Consumer demands are shifting, becoming more specific and sophisticated. Travellers' interests and reasons for travel are also becoming more specialized, so packages must be customized to lure a specific market niche or segment. Ontario offers an abundance of specialized tourism products and experiences. Opportunities exist for the industry to focus on four high-potential markets: culture, cities, outdoor/adventure and sport.

A recent report, *Strategic Directions for Ontario's Cultural Tourism Product* (1993), substantiates the future of cultural tourism in Ontario. This niche is worth developing in Ontario because of the strength of the cultural product but also because changing demographic and social trends indicate greater potential for growth.

Outdoor/adventure tourists are interested in varying degrees of packaged experiences. Ontario's natural environment offers a wide variety of development opportunities for the industry, ranging from ecotourism (focusing on growing concerns for the environment) to specialty adventure outdoors products and packages.

The range of sports facilities available in Ontario, coupled with the high number of organized sporting events, provides an abundance of opportunities to develop the sports niche in tourism. Proper packaging of Ontario sporting events, either on their own or with other tourism products, is the best way to offer consumers a full tourism experience based on their individual needs.

In many instances, these products and many others can be found in a single Ontario city. The tourism industry must take advantage of this opportunity, ensuring that Ontario continues to offer a wide variety of products to the consumer.

- **Events** — The benefits to tourism of sports and cultural events have yet to be fully tapped. The single greatest emerging motivator for travel in the 1990s is "understanding culture"; "cultural, historical or archeological treasures" are also important con-

siderations for people planning a trip¹. As a result, Ontario's strong arts, culture and heritage environment provides unique opportunities for growth. By building on existing events and festivals, Ontario will be able to capitalize on this growing trend in world tourism.

Tourism also benefits from local, regional, provincial, and international sporting events. Positive effects include sales in accommodation, food and beverage, and gasoline. Provincial and community awareness of the economic benefits of hosting sporting events needs to be created.

- **Demand Generators** — Ontario has several internationally recognized tourist attractions — known as demand generators — that create major opportunities for tourism growth. Niagara Falls, the Nation's Capital and the natural splendour of Northern Ontario have not been used to full advantage by the industry. Niagara Falls has had difficulty in promoting Ontario and Canada to travellers, despite its global recognition, and the opportunities for Northern Ontario need to be examined more closely.

Ontario has a unique opportunity to capitalize on the high number of travellers who come to the province each year to visit the Nation's Capital. However, Ottawa's potential as a year-round destination has never been fully realized. The volume of business travellers to Ottawa creates different challenges. Specialized marketing strategies must be developed to ensure that all the benefits are reaped.

The industry also needs to examine opportunities for the development of future assets, such as the casino development in Windsor and recent interest in a major cruise line for the Great Lakes. By identifying consumer demand and the growth potential of these new products, the industry can strengthen itself over the long term.

- **Gateway Marketing** — Geographically, Ontario is well positioned as a tourism destination. Its proximity to major markets in Quebec and the United States gives the industry a competi-

1. Source: Lou Harris Poll for *Travel and Leisure Magazine*, 1992.

tive advantage over some other destinations. Ontario has not been taking full advantage of this situation, however.

Niagara Falls, Ottawa, Toronto, and Windsor are major gateways to Ontario. Steps are needed to ensure that these cities continue to grow as destinations but that they also provide opportunities for other parts of the province. The key is to use these destinations to move travellers throughout the province and extend their length of stay through the development of circuit tourism.

Immediate steps need to be taken to build Niagara Falls, Ottawa and Windsor as unique experiences representing Ontario's culture and society. This will excite travellers and encourage them to visit other destinations. Gateway partnerships need to be encouraged between these cities and other destinations in Ontario to ensure that the entire province benefits.

Toronto is already recognized as a high-quality destination in the world tourism market. The key is to ensure that this trend continues and offers all regions an opportunity to profit. About 43 per cent of all international and U.S. air arrivals in Canada flow through Pearson Airport. Toronto is also well positioned as a location for world-class sports and cultural activity.

Through better packaging and product development, these gateways can improve their positions as leading tourist destinations. In addition, by developing specialty partnerships with the gateway cities, other regions can benefit. Linking gateway cities through niche markets to other tourism destinations will provide an opportunity to strengthen Ontario's tourism industry immediately and for the long term. The industry needs to ensure that full advantage is taken of all ports of entry, and the potential of other cities to be marketed as gateways needs to be examined. Specifically, the industry needs to identify opportunities for Fort Frances, Sault Ste. Marie, Cornwall, Lansdowne, and Sarnia.

- **Information** — By improving the availability of consumer information, the industry can encourage visitors to make better and more informed decisions. This may also increase their length of stay in Ontario. Improving the accessibility of information also serves to complement the marketing of Ontario as a desirable destination, both as an incentive to select Ontario and as a vehicle to help deliver a pleasurable tourist experience once in the province.

The widespread use of technology has made destination marketing much more sophisticated. The CRIS Ontario pilot project, implemented by the Ministry of Culture, Tourism and Recreation in May 1993, offers the industry a springboard for growth in technology. The government should work with the private sector to ensure that full advantage of this opportunity for the tourism industry is being taken. Reservation and information networks must be linked to the industry's supplier services, e.g., ticketing agents, travel agents, airlines, etc.

- **Grading and Classification** — A wide range of tourism products is available in Ontario, each offering different experiences to the travelling public. The challenge is to develop a grading and classification system that allows consumers to understand the product they are buying while encouraging participation by tourism businesses. Grading and classification systems give consumers specific information on which to base tourism choices and, when linked to effective marketing strategies, give business operators appropriate opportunities and the incentive to participate.

TOURISM MARKETING STRATEGIES AND OBJECTIVES

Goal: To achieve leading levels of tourism growth in Ontario.

Strategies And Objectives

Develop consistent branding, imaging and positioning reflecting Ontario's regional and product diversity for Ontario's major visitor sources (Ontario, domestic, United States, overseas) for use over the long term.

- Carry out provincial and regional consumer research on imaging and branding.
- Implement a branding program identifying the regional/ Ontario images to its major target markets.
- Put in place an image-building program for the province with a ten-year commitment.

Become a world-class provider of tourism products to our priority niche markets.

- Clearly determine niche market opportunities for each region.
- Conduct benchmarking for "best of class" practices related to tourism products, infrastructure and priority niche markets.
- Implement customer-driven niche marketing programs.

Find better ways to use internationally recognized assets and strategic linkages to increase tourism.

- Implement specific marketing strategies for the internationally recognized assets.
- Establish strategic partnerships in key international markets.
- Develop circuit tourism opportunities, linkages and partnerships within Ontario to capitalize on Ontario's international demand generators.

- Package and market existing local and regional festivals and events.

Enhance Ontario's competitiveness by attracting world-class cultural and sports events with major events throughout each year.

- Support and develop regional events from Ontario's existing sports and cultural events.
- Plan, develop and invest to obtain major sports world championships, cultural exhibits and events in different regions each year.
- Develop a comprehensive seasonal events calendar and begin to market the concept of celebrating Ontario through its events.

Market Niagara Falls, Ottawa and Windsor as gateway cities to Ontario.

- Develop gateway strategies for Niagara Falls, Ottawa and Windsor.
- Promote gateway partnerships between these cities and other Ontario tourism destinations.
- Identify gateway marketing opportunities for other ports of entry (e.g., Fort Frances, Sarnia, Sault Ste. Marie, etc.).

Market Toronto as a gateway city to North America.

- Position and market Toronto as a strategic international gateway to North America, alongside Chicago, New York, and Atlanta and, as the key international entry point to Ontario.
- Develop gateway partnerships between Toronto and other Ontario tourism destinations.
- Build events unique to Toronto and raise them to international status.

Identify an appropriate customer-driven classification and quality assurance system (grading program) implemented by industry and linked to marketing.

- Analyze existing grading and classification systems (e.g., Canada Select) to determine a suitable, cost-effective system by which tourism properties in Ontario will maintain defined quality and grading standards and will have the option of being graded and classified.
- Ensure that the grading and classification system is linked to marketing initiatives and the information network.

Provide "best in the world" methods for consumers to acquire information and buy Ontario tourism products and services.

- Develop and implement a tourist information strategy that includes the use of technology.
- Implement an appropriate, province-wide computerized information and reservations system with links to existing tourism information networks that will position Ontario as a world-class leader in the tourism information field.
- Provide an easy-access network of tourist information centres.

Chapter 4

Building the Essential Capacity to Deliver a High-Quality Tourism Experience

A RECURRENT THEME THROUGHOUT THE TOURISM STRATEGY PROCESS was the need to develop the ability to differentiate Ontario as a special tourism experience. This involves having the right work force skills in place to provide a quality tourism experience. It includes developing the tourism infrastructure to position Ontario as the fresh and exciting destination that visitors are expecting. It means creating a tax and regulatory environment in which the industry is encouraged to invest in products, anticipates market trends, and recognizes the environment as an essential component of tourism in Ontario. Finally, there is widespread recognition that the industry must become an effective communicator. Awareness of the economic and social importance of tourism must be built quickly. Ontario's tourism industry will work best when everyone feels they are part of an important partnership, one that combines direct enjoyment of the tourism experience with the benefits achieved in provincial economic growth.

In this chapter, we present goals, strategies, and objectives for strengthening the key capacities that will provide a high-quality tourism experience and convey a real sense of value to tourists visiting Ontario. These directions are set out in four areas:

- Attracting and developing people
- Making high-return improvements in the physical infrastructure
- Shaping the policy, regulatory and tax regime
- Raising the industry profile

ATTRACTING AND DEVELOPING PEOPLE

THE TOURISM INDUSTRY IS REALLY ABOUT PEOPLE. It's about the people who seek a break from their day-to-day lives to enjoy a special experience. It's about the entrepreneurs who think about the tourism experience, take the risks and offer the attractions, products, and services. And it's about the people who make the tourism experience happen and play the pivotal role in defining the quality of that experience.

Underlying the new Ontario Tourism Strategy is a fundamental drive to higher and higher levels of value being provided to the tourist. It is based on the simple recognition that this is what the tourists of today and tomorrow want. It is also based on the reality that tourism is a traded industry; for the industry to succeed, it must attract new levels of tourism from the United States and overseas as well as from the rest of Canada. International competitiveness of the tourism sector is largely dependent on the training and development of the people who provide and manage service delivery. To succeed internationally, Ontario tourism will need to surpass the special experiences that are offered by others. Tomorrow's tourism will depend even more on the quality and skills of the people who are Ontario's tourism industry.

Employment in tourism attracts a wide range of individuals and provides opportunities for key employment equity designated groups. Its labour force is predominantly female and has higher than average representation from minority groups, including racial minorities, persons with disabilities, and Aboriginal peoples. Its workers are young and either are still in school or have recently graduated. Tourism is also the largest employer of new Canadians. The jobs themselves vary from full- to part-time and year-round to seasonal. These characteristics give tourism a substantial opportunity to train Ontario's work force and to develop the province's human resources to meet the challenges of a changing economy.

Tourism provides opportunities to develop skills. Tourism is seen as a "head start" industry; many people have their first job in

tourism and are able to transfer the skills they acquire to careers in other industries. The basic skills training available for individuals new to the work force is essential to the industry and crucial to those who want to develop themselves more fully.

Enlightened companies recognize that training is essential and retaining employees critical; turnover costs are too great to do otherwise. At the same time, the career potential of tourism presents exciting possibilities for those who remain in the industry. Despite the low-wage reputation of some industry sectors, employment in tourism offers many fringe benefits and tremendous opportunities for upward mobility in management. Tourism is not only an industry in which there are few obstacles to entry and the pursuit of a rewarding career, but it is also one populated by entrepreneurs. Opportunities abound to establish and run a small business. As the industry grows, so will all these opportunities for individuals.

The Advisory Committee sees the challenge of developing skills in the diverse tourism work force as essential to the industry as well as its capacity to deliver a high-quality tourism experience. This goal is intrinsic to the way the industry works — the challenge is to intensify and broaden the training, skills and career development effort in the tourism industry in Ontario. There is a need to invest at three levels: front line employees, management and in the support systems and structures.

PREPARING ONTARIO'S TOURISM WORK FORCE

Quality of Service — With increasing worldwide competition, travellers expect high levels of service quality and value in Ontario's products and services. One of the fundamental issues identified throughout the strategy process was that customers are becoming more demanding and discerning. To compete with other tourism destinations, Ontario must develop internationally recognized levels of customer service. The quality of the Ontario tourism

product will attract visitors to Ontario, but the quality of service and human interaction they experience will bring them back.

Occupational Standards — Recent demographic trends and shifting consumer demands have led to changes in consumer preferences, but they have also created a need for a more specialized and sophisticated work force. Occupational standards need to be developed to maintain professionalism in the industry. This will ensure that both employees and employers recognize the level of skills required to serve the travelling public.

Training — The career potential in tourism is extremely high; tourism is one of the few industries in which employees can still work their way to the top. The tourism industry employs many with little or no formal education; they rely on training received within the industry to increase their employment opportunities and realize career potential. Proper training is key to ensuring that everyone in the industry is able to reach the highest level of job satisfaction, earning power and potential.

Certification — Ontario's tourism industry needs a broadly recognized, standardized system of certification. Currently, programs and courses offered to certify employees are not recognized across all industry subsectors. Educational institutions, firms, sector associations and other organizations providing certification programs need to continue working together to improve co-ordination in this area.

Goals: **To attract, develop and retain a tourism work force that exceeds 'visitors' service expectations.**

To create, enhance and strengthen pride and professionalism within the tourism industry.

Strategies and Objectives:

Improve service quality in Ontario's tourism industry.

- Develop, implement and promote a province-wide customer service training program based on best practices and standards.
- Design and implement a service excellence award program.

Increase the skills and knowledge of employees in the industry.

- Establish and implement occupational standards and a competency-based industry certification system that is recognized nationally and internationally and that will improve product delivery in Ontario's tourism industry.

Heighten awareness of career opportunities in the industry and awareness of professional development available for all sectors.

- Develop a program to attract people to work in the industry.
- Encourage individuals to recognize the career opportunities in the industry.

Develop and promote an integrated tourism education and training system supported by relevant tools, service, and research.

- Develop an integrated and co-ordinated provincial tourism education and training system to ensure that all employees and employers can reach the highest levels of professionalism, effectiveness and job satisfaction.
- Support ongoing communications/research of human resources/training issues affecting tourism in Ontario.
- Maintain a sustainable organizational structure incorporating a business-based operational approach to co-ordinate and support human resource development in Ontario's tourism industry.

Improve the funding base available for human resources development activities.

- Identify methods for broadening and strengthening the funding base of the Ontario Tourism Education Council.

MAKING HIGH-RETURN IMPROVEMENTS IN THE PHYSICAL INFRASTRUCTURE

INFRASTRUCTURE PLAYS A KEY ROLE IN THE DELIVERY of a quality tourist experience; it does so by creating superior ease of access and mobility, right-sized and up-to-date core facilities, a sense of welcome, an attractive environment, and tourist-friendly information systems to enrich and prolong the tourist's length of stay.

Ontario has a well developed and relatively modern transportation infrastructure, with an extensive road system, national and international air links, and bus and rail transportation in the main corridors. Access to major tourist destinations is uneven, however; and there is inadequate co-ordination among transportation modes. Although the transportation infrastructure has been adequate in the past, world standards and tourist expectations are now higher than ever, while maintenance of Ontario's transportation infrastructure has been declining. For the province to remain competitive and maximize its tourism opportunities, Ontario's infrastructure requires updating, enhancement and increased co-ordination.

The information infrastructure is also very fragile, relying heavily on funding levels that have been relatively stagnant. As a result, Ontario's tourist information systems are not well developed, and what systems do exist are not well co-ordinated.

Investing In Ontario

Improvements in Ontario's infrastructure will benefit the entire province and not simply the tourism industry. Through capital investment and job creation, Ontario will become a better place to live, work and play.

- **Access** — Improved access enhances the attractiveness of the tourism destination in the eyes of the traveller. Ease of entry and the ability to travel within and between regions have a major impact on the overall tourism experience. Existing modes of

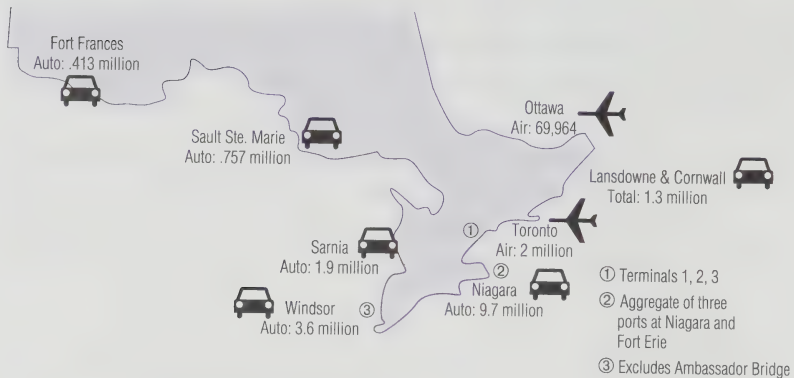
transportation tend to function in isolation from each other, making it difficult for tourists to reach their destinations easily and conveniently.

Ontario's transportation infrastructure is also deteriorating. Improvements are needed in highway, air and waterway systems to offer tourists the best possible experience.

Ontario's natural environment has given the tourism industry a competitive advantage, but that advantage that has not been fully realized. The Great Lakes, Ontario's river systems and hiking trails offer avenues for development whose potential has not been fully tapped.

- **Pearson International Airport** — Pearson is one of the 20 largest airports in the world. In 1992 more than 5.5 million people travelled through Pearson. The airport generates \$4 billion in revenues annually and creates more than 55,000 jobs in direct and indirect employment. However, Pearson is in jeopardy of losing its international position as a result of recent airport developments and expansions in other jurisdictions (e.g., Pittsburgh, Washington, and Philadelphia). Steps need to be taken to diminish the threat and allow Pearson to maintain and improve its performance.
- **Sense of Arrival** — Ontario needs to provide a more tourist-friendly environment. Improvements are needed in several key areas, from perfecting the reception of foreign travellers at customs, to developing physical facilities at borders. Visitor perceptions of Ontario are formed the moment they cross the border, and Ontario needs to ensure that this perception is as positive as possible.
- **Gateway Development** — More than 20 million tourists from the United States and overseas entered Ontario in 1992 through 11 ports of entry (Exhibit 4.1). This does not include the high volume of commercial traffic - such as trucking and air cargo - that flows into the province each year.

Exhibit 4-1 Number of International Travellers Entering Ontario by Port of Entry and Mode of Transport - 1992



Source: Statistics Canada International Travel Survey 1992.

Considerable potential exists to take advantage of the number of arrivals in these border cities and position them as gateways linked to the entire province.

The development of comprehensive gateway strategies would improve the ability of these cities to increase visitors' length of stay and encourage visitors to travel to other Ontario tourism destinations. These strategies envisage major infrastructure developments to improve ease of access, sense of arrival, and access to information, attractions and other tourist facilities.

- **Information Infrastructure** — During the regional consultations held to develop this strategy, highway signage was identified as the number one infrastructure issue to be addressed. In other jurisdictions, tourism highway signage systems have demonstrated that signage is a relatively simple and effective tool in promoting business and generating economic development in tourism.

Tourist information centres are also important in the development and growth of tourism. The province's system of tourist information centres must be used more effectively, creating better links between the Ontario tourism product and consumers. A strong information network is required in Ontario, one that

incorporates signage systems, information centres, publications, and other tools and technology to ensure the tourist is in the best position to make decisions.

- **Tourism Facility Improvement** — Convention, congress, conference and trade centres have been positive net exporters in tourism. Convention business is high-impact, drawing large numbers of visitors, most from out of town, who stay for extended periods and make higher than average expenditures. However, Ontario's position in this market has been eroding as new and larger centres are developed in the United States. Long-standing customers have outgrown Ontario facilities and have moved their events to U.S. cities. The Advisory Committee has identified two markets where consumer demand warrants further development of existing facilities— Toronto and Ottawa.

Ontario's provincial government agencies and attractions such as the Art Gallery of Ontario, Algonquin Park, and Science North need to be recognized for their contributions to Ontario's tourism industry. These facilities must be given the opportunity to contribute to future tourism growth in the province.

Capital investment in Ontario's other tourism-related facilities must also be encouraged. New partnerships must be formed between the industry, lenders and investors to take advantage of emerging consumer demands (e.g., cruise shipping on the Great Lakes).

Goal: To enhance the physical and information infrastructure required to strengthen Ontario's position in the world tourism market.

Strategies And Objectives:

Make Ontario more accessible for tourists.

- Improve accessibility to all parts of Ontario by improving linkages between modes of transportation provided by the private and public sectors.

- Develop Pearson International Airport as a North American gateway for transatlantic tourists against key competitors such as New York, Chicago and Atlanta.
- Improve transportation facilities between key gateways and Ontario's main tourist regions.

Improve the sense of arrival and welcome at Ontario's main gateways.

- Improve administrative facilities, physical environment and processes at key entry points.
- Enhance the sense of arrival in key gateway cities by implementing comprehensive development plans (including signage and information centres) in the gateway communities.

Implement comprehensive gateway strategies for Ontario's main ports of entry.

- Design and implement gateway strategies incorporating access, sense of arrival, facility development and information access.

Make Ontario more information-friendly for tourists and the tourism industry.

- Implement comprehensive tourism-oriented highway signage in Ontario that is compatible with our key feeder markets.
- Expand the network of information centres selling and cross-selling the tourism product.

Enhance tourism facilities that contribute to growth of Ontario's tourism sector.

- Support development/expansion of convention and trade show space where commercially viable (i.e., Toronto and Ottawa).
- Identify the potential for existing MCTR and other tourism-related government agencies to contribute to tourism growth.

Encourage business investment in tourism infrastructure.

- Develop a strategy to facilitate access to capital by the tourism industry for major infrastructure projects.
- Work directly with financial institutions to identify additional growth opportunities for the industry in Ontario, allowing it to compete in the international market.

SHAPING THE POLICY, REGULATORY AND TAX REGIME

THE TOURISM INDUSTRY has not traditionally been a strong player in shaping and influencing government policies, regulations and initiatives. Its importance to the provincial economy has not been sufficiently understood or recognized. As a result, significant regulatory and taxation barriers limit the tourism industry's competitiveness, profitability and future role in the economy of Ontario.

- Taxes applied to tourism business can create competitive disadvantage and affect tourism business profits for reinvestment.
- The tourism industry needs to become a central participant in processes to establish environmental regulations and legislation. The current natural resource management planning system in Ontario is not conducive to ensuring the sustainability of the resource-based tourism industry over the long term.
- The design and implementation of regulations protecting the rights and interests of workers must accommodate the distinct characteristics of the tourism industry while recognizing the special opportunities provided.
- Enforceable quality assurance and minimum grading and classification standards should be established in all businesses providing accommodation services to the travelling public.

Statement Of Principle

A re-balancing of government taxation and regulatory policies will provide an opportunity to improve the competitiveness and sustainability of the industry.

Furthermore, all taxes should be rationalized to minimize inequities and to achieve a neutral revenue impact on government while significantly improving industry profitability.

Goal: To provide Ontario's tourism industry with a tax, regulatory and policy environment that fosters a competitive, profitable and sustainable industry, thereby retaining existing and generating new investment and growth.

Strategies And Objectives:

Review existing tax instruments applied to the Ontario tourism industry.

- Review the existing tax regime and identify opportunities to improve competitiveness and minimize inequities (e.g., Metro Toronto hotel assessment and Entertainment tax, Attractions admission tax).
- Review assessment procedures and municipal taxes to ensure their fair application.
- Review commodity taxes on tourism business inputs (e.g., liquor, fuel, etc.) to align tax application in the tourism industry with that in the retail, manufacturing and resource sectors.

Ensure that current and future environmental legislation and regulations enhance the growth and sustainability of the Ontario tourism industry (e.g., Environmental Bill of Rights - EBR).

- Establish a statement of environmental values for the industry as required by the EBR, based on extensive consultation and participation.

Review existing policies and regulations affecting the tourism industry in Ontario.

- Analyze existing government policies and regulations and identify their impact on Ontario's tourism industry (e.g., Crown lot usage fees, Water lot leases).
- Create permanent linkages between the Ministry of Culture, Tourism and Recreation and related provincial ministries with respect to program development, policy making, regulations and legislation (e.g., signage, licence plates, etc.).

Implement a northern resource-based tourism policy.

- Develop with government a policy incorporating access, uses and management, ensuring a long-term approach to resource management.

Recognize and accommodate the distinctive characteristics of the tourism industry in the design and implementation of regulations and legislation with respect to workers.

- Define the unique characteristics of tourism industry workers.
- Assess the impact of current worker legislation and regulations and determine which aspects are not compatible with the industry.
- Create a formal mechanism through which industry interests are given full consideration in the development of policies respecting workers.

Establish and maintain defined standards of quality assurance in all businesses which provide accommodation services to the travelling public.

- Define and develop contemporary quality assurance standards throughout the accommodation sector of the Ontario tourism industry.

RAISING THE INDUSTRY PROFILE

TOURISM IS NOT RECOGNIZED AS AN IMPORTANT ECONOMIC GENERATOR in the Ontario economy, despite its position as one of the province's largest industries, its role as a major employer, its prominence as an exporter, and its substantial contribution to the tax base. In government, tourism is considered only one component of the "consumer goods services and distribution" sector by the Ministry of Finance. Provincial decision makers often equate the small business nature of tourism with a small industry. In addition, its status as a service industry has meant that the extent and magnitude of tourism's traded activity are not understood.

In part the tourism industry will help make its own case through its future growth and performance. The fact remains, however, that the industry lacks the profile and credibility needed to assume a more important position in the economic future of the province. The tourism industry must become an effective communicator in presenting its contributions to Ontario's economic, social and cultural strength. A communications plan is required, focusing on the real story of tourism and the audiences that need to understand the industry and share in its progress and potential. This plan should target traditional lobbying audiences, but the industry must also focus on developing awareness among the general public.

Goal: To develop a communications program targeted to key audiences to increase awareness of the economic and social importance of the tourism industry.

Strategies And Objectives

Develop a communications awareness plan to raise the profile of and improve public relations for the industry.

- Undertake preliminary baseline research to determine 'share of mind' awareness of tourism's impact and importance to Ontario's economy among key decision makers and opinion leaders.
- Develop a short-term plan to target key provincial audiences.
- Work to improve tourism industry image with financial institutions.
- Develop a long-term plan to target key national and international investors.
- Develop a communications plan directed to the general public.

Advocate the interests of the industry over the long term.

- Ensure the necessary structures are in place to co-ordinate tourism industry communications with respect to advocacy.
- Support the development of a single industry advocacy organization with a stable funding base.

Work to ensure that tourism is included in economic development strategies at all government levels.

- Heighten awareness of the economic importance of the tourism industry and evoke a sense of pride in the province of Ontario and its tourism product.
- Develop, with government, a minimum of five key statistical indicators for the industry to be used over the long term.
- Encourage the Ministry of Finance to separate tourism from the other industries in the consumer goods, services and distribution sector.

Chapter 5

Strengthening Key Industry Organizations

THE TOURISM INDUSTRY'S MAIN COMPONENTS are facing serious financial pressures, and many in the industry are asking whether the current arrangement of roles and responsibilities can provide the focus and strength to help tourism realize its full potential and become a leading industry in the Ontario economy. Yet implementing Ontario's new tourism strategy will require strong and effective industry organizations.

This would be a major departure from what exists today; it is so important, however, that **the Advisory Committee believes that unless an effective industry structure and financing approach result from this strategy development process, the potential impact of the other recommendations will be severely limited.**

One of the major issues identified at the beginning of the consultative process was the need for a common vision, leadership and an integrated industry approach to reduce duplication of effort and increase partnerships. Ontario's tourism industry is important to Ontario's economy, but recognition of this fact is not widely shared. This results, in part, from the industry's difficulty in rising above internal differences to represent itself as an industry. The financial resources of the industry are uncoordinated and unfocused. This has not allowed the industry to reach its full potential.

Tourism in Ontario is made up of some 60,000 businesses, most of them small entrepreneurial operations. The industry is represented by more than 50 tourism industry associations. The stakes are high: the tourism industry spans the entire province and is increasingly becoming the life blood of many rural communities; major centres are also looking to tourism to help boost their economies. Yet individual interests have often been the deciding factor in industry deliberations. As a result, the industry has not been able to move beyond the gridlock of industry fragmentation and local and regional interests. Steps must therefore be taken to increase co-operation and to improve co-ordination and cohesion within the industry.

The current industry structure is shown in Exhibit 5.1.

Exhibit 5-1 Current Industry Structure



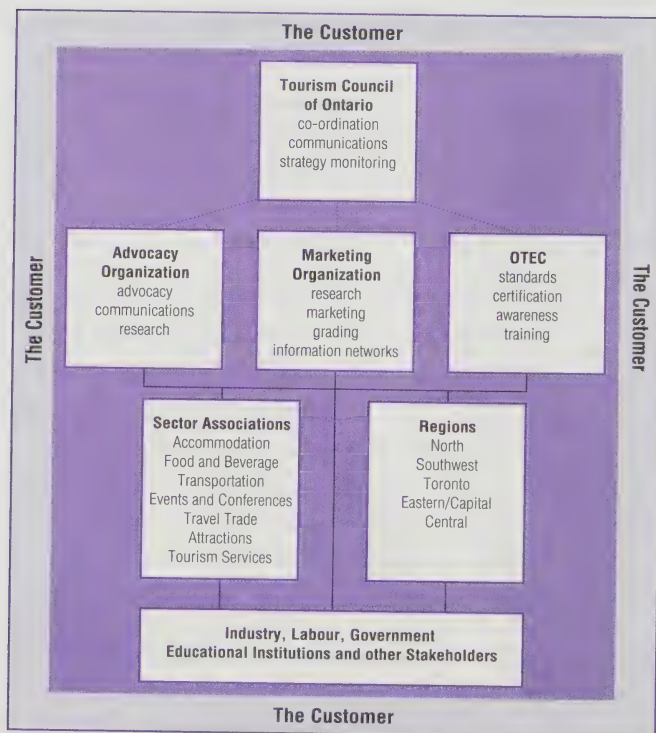
* Ceased operation October 1993.

Regional and industry consultations identified some fundamental needs in establishing a new tourism industry structure:

- Clear responsibilities for marketing, product development, research, human resources development, standards, advocacy and other common industry activities.
- Customer-driven and competency-based approaches to marketing and product development, human resources development and advocacy.
- Strong regional structure and increased input at the local level.
- Effective mechanisms for communicating with all levels of government.
- Improved communication and linkages among sector associations.
- Strengthened partnerships now and for the longer term.

The Advisory Committee considered these needs in determining the best possible organizational structure for the industry. Several restructuring options were reviewed before concluding that the future structure should entail separate organizations for provincial marketing, human resources development and advocacy — each with a clear mission, distinct focus and business structure. Effective co-ordination will be achieved through representative board appointments and co-ordinating mechanisms. Also critical to this new structure is clear two-way communication between all participants. This will ensure that policies and programs reflect the needs of individual businesses while meeting regional and provincial objectives. The tourism industry structure we propose is shown in Exhibit 5.2. For this progression to take place, however, the industry needs to take a serious look at how it does business.

Exhibit 5-2 Proposed Industry Organizational Structure



The key features of the proposed industry structure are as follows:

- A Tourism Council of Ontario to ensure linkages and co-ordination across the lead Ontario tourism organizations.
- A new provincial tourism marketing organization.
- Effective regional tourism organizations.
- A strong human resources development organization (OTEC).
- A single, influential and effective provincial advocacy organization or mechanism.
- Funding support through industry and government.

Tourism Council Of Ontario

The Ontario Tourism Strategy represents fundamental and pervasive changes for both industry and government. Winning marketing directions need to be set, and increased investments in marketing need to be made. Human resources, tourism products and the physical infrastructure will all have to move along a course of supporting the strategy and increasing the value provided through tourism experiences. As well, a completely new approach to industry advocacy needs to be put in place, one that sets tourism apart from other industries through the power of its province-wide representation and outstanding staff work supporting its position on issues. One result will be a shift in the role of the provincial government for tourism, from a mixed policy and operational role to a clear policy mandate.

The Advisory Committee believes that discussion and resolution of strategic issues related to the direction and co-ordination within the new tourism industry structure require a forum. As a result we recommend that:

The Tourism Council of Ontario be established to advise the Minister of Culture, Tourism and Recreation on the implementation of the tourism strategy and the future of the tourism industry in Ontario.

The core responsibilities of the new Tourism Council of Ontario would include:

- providing co-ordination between the marketing, human resource and advocacy organizations;
- ensuring sound business principles are used based on best practices;
- overseeing the effective implementation of the Tourism Strategy and working to resolve issues or barriers that may arise;
- providing an effective mechanism for increased communication and co-operation within the industry so that partnerships are encouraged and duplication of effort is diminished; and
- influencing all levels of government on major capital development and infrastructure investment that affect the tourism industry in Ontario.

The proposed council should be relatively small so that the key players can be at the table and an action-based agenda pursued. We see the council as a six-member body with representatives from the proposed provincial marketing organization, the Ontario Tourism Education Council, the proposed advocacy organization, industry, labour and government. After three years, the continuing requirement for and role of the council should be reviewed.

A New Provincial Tourism Marketing Organization

The new provincial tourism marketing organization should be an effective partnership between business and government. For this organization to be effective, it must have strategic and operational independence.

This approach represents a repositioning of the current tourism marketing function within the Ministry of Culture, Tourism and Recreation under a separate board of directors. This Board would be responsible for appointing the Chief Executive Officer as well as for the overall performance of the new marketing organization.

Our assessment of the benefits of an industry-driven marketing organization is based on the success of this approach in other tourism destinations, particularly Australia, Britain and France. The British Tourism Authority (BTA), for example, has been a crucial factor in positioning tourism as a top industry in Britain. With a clear focus on marketing and the development of the tourism industry, the BTA was able to develop unique tourism marketing capabilities and influence the industry through the “power of competence”. Canada is considering this type of organization at the federal level.

The Advisory Committee has opted for a made-in-Ontario approach, based on a better understanding of what governments and businesses each do best. International tourism models can, however, provide a clear picture of what changes need to take place:

- Business needs a clear mission so that precise goals and measurable objectives can be set and results measured. Government-based organizations must balance policy and program delivery responsibilities. This inherent conflict often makes it difficult to provide a clear focus and long-term commitment to operational responsibilities.
- Business needs rapid decision making to maximize the competitive advantage of time. Government decision-making systems

are inherently slower, allowing competing interests to be worked out and collegial decisions reached. Such systems are also risk-averse, with little or no reward for risk taking.

For these reasons, the Advisory Committee recommends that:

A new provincial tourism marketing organization, led by industry, be established by the government of Ontario.

The provincial marketing organization would develop a tourism marketing plan for Ontario to achieve the performance objectives identified in this strategy. The plan would be developed in consultation with the proposed regional organizations. The result would be a provincial marketing plan combining specific products and destinations in the most effective way to achieve growth targets.

The core responsibilities of the new provincial tourism marketing organization would include:

- marketing and product development — branding and positioning;
- marketing research and dissemination in co-ordination with organizations (such as the Canadian Tourism Research Institute) and with linkages to other agencies and educational institutions on Ontario-specific research;
- product classification and quality assurance (grading programs) with particular attention to regional marketing potential and delivery;
- information networks to deliver information on Ontario's tourism markets to the customer (e.g., information centres, reservations systems, etc.);
- focusing on product lines the customer will buy rather than simply trying to promote destinations;
- event marketing and planning support;
- ensuring that provincial demand generators (e.g., Niagara Falls, the Nation's Capital and the natural splendour of Northern Ontario) are being marketed to their full potential.

- negotiating with and influencing the federal government on marketing activities affecting Ontario and facilitating co-operative marketing opportunities with Tourism Canada; and
- provincial tourism marketing expenditures in international markets.

The provincial marketing organization would be responsible for critical niche-product marketing that is province-wide in nature. This could be facilitated by the appointment of product managers where demand warrants. This organization would also facilitate the integration of all regional and product marketing programs to maximize return on investment and contribute to the overall strategy targets and visitor mix objectives.

As we have indicated, the new provincial marketing organization should have an independent and accountable governance structure based on a partnership between business and government:

- A Board of Directors of 14 people (six regional representatives – Southwestern Ontario, Toronto, Central Ontario, Eastern Ontario and the Capital, and Northern Ontario (2); seven representatives of the industry at large – air transportation, ground transportation, accommodation, food and beverage, attractions, travel trade, support services; and one government representative). *Other participants may be invited to sit on the board as non-voting guests as deemed necessary by the Chair.*
- The Board would be vested with independent strategic decision making and day-to-day management and would appoint the Chief Executive Officer.
- The Board would review and approve the annual provincial marketing plan and make necessary adjustments to ensure that targets are being met and advantage taken of new opportunities as they arise.
- The Board and the proposed provincial tourism marketing organization would have their own financial structure, including a balance sheet and financial statement. It would work outside the Consolidated Revenue Fund and be able to retain funding and earnings.

- The Board and the new provincial tourism marketing organization would receive Ministry of Culture, Tourism and Recreation funding for tourism marketing and customer service programs and administration.
- The organization would work under the human resource policies of the Ontario government, including collective bargaining and successor rights. Staff would be appointed under the Public Service Act.
- The Board would establish policies and procedures for administering supplies, equipment and services, real property, creative services, information technology.

The new provincial tourism marketing organization should be driven by business principles and business performance measures and incentives. It is intended to increase industry control of marketing strategies and marketing programs and is positioned to seek business involvement in funding partnership marketing initiatives. In this way, it must attract increasing amounts of funding from industry and other non-traditional sources for greater effectiveness and impact. Innovative approaches to packaging and partnering the tourism product, based on consumer demand, must be developed. In particular, a prime directive of the new organization would be to pursue horizontal and vertical linkage opportunities, focusing on marketing efforts that complement the tourism strategy's goals and objectives to increase visitation to and spending in Ontario.

Effective Regional Tourism Organizations

Strong regional tourism organizations will be an essential part of the new provincial tourism industry structure. The Advisory Committee recommends that:

Five regional tourism organizations be established with responsibilities for marketing, human resources and advocacy.

The Advisory Committee sees the primary function of the regional tourism organizations as regional marketing. They would fulfil an important function as the operational link to the new industry structure and play a key role in building regional imaging and branding. Actively building partnerships with regional businesses to develop tourism growth through creative programming, along with destination selling, would be the main responsibilities of these new organizations.

The regional tourism organizations will be responsible for marketing both destinations and product within their specific areas. They will design and implement, in consultation with the provincial marketing organization, a regional brand strategy and will be responsible for managing this brand.

The core functions of the Regional Tourism Organizations with respect to marketing would include:

- regional branding — developing the image of the region and building the regional industry into the image of the brand;
- regional marketing to attract more visitors to the region;
- consumer advertising involving partnerships with industry;
- direct sales and marketing;
- providing information to tourists;
- developing and marketing regional events;
- developing, with the provincial marketing organization, marketing strategies for demand generators;
- providing research information to regional operators (region specific such as economic and social benefits to the region);
- publishing and distributing regional information guides;

- managing the product and service quality program – linking grading and classification to marketing at the regional level;
- regional communications and public awareness programs; and
- co-ordinating partnerships and packaging to capitalize on cross-regional products and programs.

The regional tourism organizations would participate in developing the provincial marketing plan through their representation on the provincial marketing organization's Board of Directors and ensuring that the regional perspective is voiced in decisions. However, the regional organizations must not be limited to their geographic boundaries but will need to co-operate with each other to promote and participate in cross-regional and province-wide product opportunities.

These regional tourism organizations will be represented on the Ontario Tourism Education Council. They will communicate the human resource needs of the region and ensure that appropriate programs are developed and delivery mechanisms put into place. These organizations will deal directly with the challenge of advancing the professionalism of tourism in the region and ensuring essential skills are being developed. In this capacity, they will work provincially at the strategic level to ensure that regional needs are met. Within the region, these organizations will serve as brokers to ensure that the training and educational capabilities of the region are in place and that the needs of the local tourism industry are being addressed.

The regional tourism organizations will also be represented on the new provincial advocacy organization. The Advisory Committee recognizes that these organizations will be active in their regions in shaping policies and regulations that support a strong and growing tourism industry. Such advocacy will be in support of the business mission of the regional tourism organizations and will involve discussions with all levels of government on relevant issues. This activity will be an integral part of realizing the economic potential of tourism in each region. The regional tourism

organizations will be involved in setting priorities at the provincial level to support a unified industry advocacy approach and in overseeing the provincial policy research program.

Once the regional tourism organizational structure is established, a review will take place within the regions to determine the most appropriate administrative arrangements. Regions now have very different structures in place (e.g., Ontario Travel Associations) and are at different points in their development. In some regions, such as Toronto and the Eastern Ontario/Capital Region, the basic structures are in place. Other regions will approach the organizing issue from a different direction. As a result, no single model is proposed at this time. As the new provincial marketing organization begins to function and its relationship with the regional tourism organizations becomes more clearly defined, the regional organizations will adapt and reorganize to serve their regions. In this process, organizational development will be guided by the needs of tourists, the capabilities required, the branding that takes shape, the ways involvement can be realized, and the reality of the cost pressures that will be common to all regions.

Sector Associations

The Advisory Committee recognizes the importance of sector associations and the fact that marketing must be customer- and product-driven. Many businesses in Ontario cut across regional boundaries, so it may be advantageous for the industry to pursue province-wide marketing initiatives. Sector associations will play an important role in co-ordinating product marketing at the provincial level. This will ensure that scarce resources are being used effectively.

Building A Strong Human Resources Development Organization In Tourism

The Ontario Tourism Education Council (OTEC) was established in 1991 as an independent agency that brings industry, labour, government and educational agencies together to develop and

carry forward the human resources development agenda for tourism in Ontario. OTEC is still in the early stages of development, but in the view of the Advisory Committee, it is well positioned to be the lead agency in the field of human resources in tourism.

The OTEC Board of Directors is made up of twelve industry management representatives and six members drawn from labour and educational institutions. Through this set of relationships, OTEC provides the necessary linkage to educational institutions, industry, and labour on provincial human resource development issues. OTEC will also be tourism's liaison at the federal level with the Canadian Tourism Human Resource Council.

OTEC's goals reflect the human resources development requirements of tourism:

- encouraging the development of a well-qualified and motivated tourism industry workforce;
- encouraging the development of a sufficient supply of human resources;
- supplying human resources information to the industry; and
- linking industry, government and the education system with respect to human resources issues in the tourism industry.

The Advisory Committee examined whether the OTEC function should be included in the new provincial marketing organization or remain separate. The conclusion was that separate positioning is essential if both organizations are to pursue clearly defined missions. Moreover, OTEC will pursue separate program funding relationships with the Ontario Training and Adjustment Board and the federal government.

Although OTEC's work will be vital to improving service delivery and enhancing the industry's value-added capability, tight day-to-day linkages through an integrated organizational structure are not required. Rather, the necessary co-ordination can be achieved through working level co-ordination with the new provincial mar-

keting organization. Strategic co-ordination will be achieved through OTEC's membership on the proposed Tourism Council of Ontario. It is at this level that strategic and operational matters relating to mutual support, sponsorship, liaison and communication will be addressed.

OTEC will be responsible for the development of occupational standards and certification programs with the industry, taking into account developments at the national and international level. Within this framework, OTEC will work to ensure the successful delivery of training and education to support the development of the industry's work force.

While the potential for program funding appears very promising for OTEC, there is a serious risk that the lack of industry commitment to operational funding may severely limit the ability of OTEC to achieve its full potential. For this reason, the Advisory Committee recommends that:

Operational funding for OTEC continue to be provided by government.

Establishing A Single Effective Ontario Tourism Advocacy Organization

DURING THE FINAL STAGES OF THE DEVELOPMENT of the Ontario Tourism Strategy, Tourism Ontario closed its operations. This event was a vivid reminder of the industry's difficulties in establishing a strong tourism advocacy organization. Tourism Ontario's experience provided valuable lessons in the problems the tourism industry has faced in getting organized.

Tourism spans every part of Ontario — no industry is as broadly provincial in scope. The industry encompasses a broad range of sectors; within sectors, operations range widely in size - from multinational corporations to local operators. Regardless of size, industry businesses are characterized by an intense spirit of entrepreneurship and a fiercely engrained culture of independence. In

reaching for a common voice on public policy issues, Tourism Ontario faced no small challenge.

The key lesson of Tourism Ontario was that an advocacy body's structure must provide for genuine representation of the industry. Tourism Ontario was a creature of the single-interest sector associations. Its business revenues came from fees collected from some of these associations. In 1993, Tourism Ontario had a membership that included ten industry associations and eight travel associations. It did not represent some of the major associations, and its total membership fell well short of the 50 or so associations that carry out advocacy and marketing functions in the tourism industry. Such a structure was untenable and led to the demise of Tourism Ontario.

The need for a strong tourism advocacy organization remains imperative, and its absence leaves a serious structural gap in Ontario's tourism industry. When there is no clear industry voice on crucial policy issues, the industry suffers. Moreover, looking to provincial associations to perform the broad advocacy function by themselves is not an effective answer to the future needs of the industry. Taxation, regulation, northern development, the environment and infrastructure are far too important to the future of the industry not to have well considered positions being put forward in a co-ordinated manner. As we look ahead, one measure of the future strength of the tourism industry will be the authority and credibility established by its advocacy organization.

As well, organizations such as the proposed provincial tourism marketing organization, the regional tourism organizations, and the Ontario Tourism Education Council cannot be expected to carry province-wide advocacy responsibility for the industry. Each will be a source of important advice on policy issues in their domain of activity; the regional organizations in particular will become significant policy advocates in and for their regions. But the primary role of the proposed organizations is either tourism marketing or human resources development, and the important challenges facing them will require concerted attention to their pri-

mary mission. In short, these organizations will not be, nor should they become, the principal advocacy voice of the tourism industry.

Effective advocacy is a major contributor to sound government policy. Ministries operating in the absence of effective advocacy are not often challenged to perform at their best and are not afforded appropriate levels of recognition and importance within government. The junior status historically afforded tourism within government is in part a mirror of the industry's lack of success in organizing itself and advocating its economic importance. In fact, recognition of the tourism industry by all levels of government is unlikely until the industry becomes a powerful advocate of its significance and its policy requirements.

The Advisory Committee believes that establishing a single effective Ontario tourism advocacy organization is critical if the industry is to realize its potential to be one of the most important industries in Ontario's economic future.

As a first step we recommend that:

Sector and regional associations and major companies establish a working group to prepare a business plan for establishing a single tourism advocacy organization.

The planning process be funded jointly by industry and government.

A new provincial advocacy organization would draw on broad representation from sector associations, regional organizations and industry. Moreover, the organization will be established with sustained industry funding to provide for development of a professional, credible and powerful industry advocate.

FUNDING SUPPORT THROUGH INDUSTRY AND GOVERNMENT

The Ontario Tourism Strategy and proposed infrastructure will require a stable funding base that continues a significant commitment of provincial government funding and that increasingly attracts private sector and other government funding.

In other jurisdictions where tourism is seen as part of the engine for economic growth and value-added activity, governments provide significant and continuing funding support to tourism. Many U.S. states dedicate specific taxes, combined with other sources of government funding, to fund tourism initiatives. In countries such as the United Kingdom, France, and Australia, which have been leaders in achieving tourism growth, tourism marketing and other programs have received substantial, and in some cases growing, levels of government funding. In Canada and Ontario, government funding of tourism programs has existed for some time, although the level of support has been cut back severely in recent years.

Government funding of marketing and other selected tourism initiatives should continue and not diminish. Governments should provide the funding base needed to achieve the necessary scale of activity and attract other funders to tourism activity. This is particularly the case in marketing, human resources development, and certain areas of infrastructure development.

At the same time, it is essential that government funding be seen as a starting point rather than a substitute for funding from other sources. To this end, both the new provincial marketing organization and OTEC will be able to achieve growth in revenue by:

- attracting funds from a variety of sources: federal, provincial, regional and local government programs; project funding through business and government; and partnership funding with business;
- establishing membership fee structures as a condition of program or service participation or a mandatory industry levy; and

- establishing components of the tourism infrastructure as revenue earning entities through initiatives such as booking fees and sales of materials, guide books, maps, and training videos.

The provincial marketing organization will contribute to the core funding of each regional organization as well as co-operative marketing funds for product opportunities with broad appeal based on approved marketing plans.

With the exception of some start-up funding from government, the new provincial tourism advocacy organization will be funded by the private sector. Industry funding could take the form of membership fees from businesses, sector associations and regional organizations, or a mandatory levy as identified in the business plan.

Chapter 6

Setting the Agenda for Action

THE TOURISM STRATEGY DEVELOPMENT PROCESS followed a deliberate course in establishing a new agenda for the industry in Ontario. This document is a result of the process, identifying issues, honing in on the strengths and weaknesses of the industry, and examining the key catalysts for change and future growth. The Advisory Committee developed a vision, identified new performance objectives and established clear goals and strategies to guide the industry to the year 2000 and beyond. But now the real work must begin.

Immediate action is required if tourism is to become one of the top industries guiding Ontario's future. The industry needs to sit down with governments at all levels to initiate new and innovative programs for growth. This chapter outlines the specific first steps crucial to the future of the tourism industry in Ontario.

The action plans outline a process for translating a vision, broad goals and strategy statements into new jobs, capital investment, economic growth and a wide range of other new opportunities. As a result, they are a vital component of the tourism strategy and a real litmus test of progress and new partnerships. Action plans are the key to translating all the words about what needs to be done into a stronger Ontario tourism industry. They are also the answer to the scepticism initially encountered in the consultative process. They are a map, guiding the way to a new future. They are presented in the context of the planning framework and described at a level of detail enabling swift action on them.

The action plans are set out in the following pages under the themes of this report:

- Putting in place a winning tourism marketing strategy.

- Building the essential capacity to deliver a high-quality tourism experience.
- Raising the industry profile.
- Strengthening key industry organizations.

PRIORITY INITIATIVES

For Ontario to reposition itself as a leading tourism destination, to rise to the challenges of a growing world market and to take full advantage of the opportunities presented in this document, industry and government must work together; this strategy document is only the beginning.

The Advisory Committee has identified the following priority initiatives and recommends that the Ontario government assist in their development with policy and funding support for:

- **establishing a new provincial tourism marketing organization;**
- **funding for a new marketing and branding strategy;**
- **introducing an Ontario tourism highway signage program;**
- **implementing a gateway development program;**
- **developing a tourism information strategy, including partnership with the private sector on a province-wide computer reservation and tourist information system;**
- **developing a northern resource-based tourism policy;**
- **developing a tourism investment strategy;**
- **implementing a tourism human resources development program;**
- **developing an events strategy for culture and sports; and**
- **establishing a Tourism Council of Ontario.**

The following action steps clarify the roles and responsibilities for both industry and government partners in the implementation of these and other initiatives.

1. PUTTING IN PLACE A WINNING TOURISM MARKETING STRATEGY

Goal: To achieve leading levels of tourism growth in Ontario.

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Branding			
<ul style="list-style-type: none"> Carry out research into image and branding Implement a branding program for province and regions Make a 10-year commitment to the image 	<ul style="list-style-type: none"> Prepare regional product maps Conduct market research Identify regional images to target audiences Develop regional brand statements Develop provincial brand 	<ul style="list-style-type: none"> New provincial tourism marketing organization Regional tourism organizations Industry 	Third Quarter, 1994
Niche Marketing			
<ul style="list-style-type: none"> Evaluate niche market potential in regions Implement niche strategy and packages 	<ul style="list-style-type: none"> Specifically examine Ontario's potential in the following markets: Culture, Outdoor/Adventure, Sports, cities Begin program implementation 	<ul style="list-style-type: none"> New provincial tourism marketing organization Regional tourism organizations Industry 	3Q, 94
Demand Generators			
<ul style="list-style-type: none"> Focus marketing strategies on internationally recognized assets Develop partnerships, linkages and programs 	<ul style="list-style-type: none"> Identify opportunities to market and package events around Niagara Falls, Ottawa, Windsor, the North and Toronto 	<ul style="list-style-type: none"> New provincial tourism marketing organization Regional tourism organizations 	2Q, 94

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Events and Festivals			
<ul style="list-style-type: none"> • Carry out key event promotion • Establish blockbuster event for each region • Market Ontario as a celebration of events for all seasons 	<ul style="list-style-type: none"> • Develop a provincial seasonal events calendar • Plan to attract one major international sports and cultural event starting in '95 	<ul style="list-style-type: none"> • New provincial tourism marketing organization 	2Q, 94
Gateways			
<ul style="list-style-type: none"> • Position and market Ottawa, Windsor and Niagara Falls as Gateways to Ontario • Position and market Toronto as the gateway to North America • Raise events to international levels • Build niche strategies for other gateways 	<ul style="list-style-type: none"> • Identify key competitors • Develop consumer-driven marketing plan • Create alliances with other Ontario tourism products 	<ul style="list-style-type: none"> • New provincial tourism marketing organization • Regional tourism organizations 	4Q, 94
Grading			
<ul style="list-style-type: none"> • Refine current grading and classification system to become a powerful tool for industry quality and consumer protection • Link to marketing initiatives and information network of the approach 	<ul style="list-style-type: none"> • Identify consumer preferences and expectations • Evaluate grading options based on consumer/product best fit • Assess the marketability 	<ul style="list-style-type: none"> • New provincial tourism marketing organization 	1Q, 95
Tourist Information Strategy			
<ul style="list-style-type: none"> • Develop a Tourist Information strategy • Put in place an information and reservations system • Build an effective network of tourism information centres 	<ul style="list-style-type: none"> • Develop a comprehensive tourism information strategy and plan • Evaluate CRIS Ontario pilot project and identify opportunities to expand the system • Identify options for private sector involvement in the delivery of a province-wide information and reservations system 	<ul style="list-style-type: none"> • New provincial tourism marketing organization • Industry • Government 	2Q, 94

2. BUILDING THE ESSENTIAL CAPACITY TO DELIVER A HIGH-QUALITY TOURISM EXPERIENCE

"Attracting and Developing People."

Goal: To attract, develop, and retain our current and future tourism work force and prepare it to exceed visitors' service expectations.

To create, enhance and strengthen pride and professionalism within the tourism industry.

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Service Quality			
<ul style="list-style-type: none"> Develop province-wide customer service program Design service excellence awards program 	<ul style="list-style-type: none"> Define service quality Transform current best practices into program Develop awards program 	<ul style="list-style-type: none"> OTEC Provincial tourism marketing organization Industry 	3Q, 94
Skills Development			
<ul style="list-style-type: none"> Establish a competency-based industry certification system 	<ul style="list-style-type: none"> Prepare a skills development map of occupational standards Determine where national and international standards exist and assess their applicability Set priorities for next three years 	<ul style="list-style-type: none"> OTEC Ontario Training and Adjustment Board Canadian Tourism Human Resources Council Educational Institutions 	3Q, 94
Awareness			
<ul style="list-style-type: none"> Build recognition for career opportunities in the tourism industry 	<ul style="list-style-type: none"> Identify opportunities to use existing vehicles to promote career opportunities Obtain industry support and partnership 	<ul style="list-style-type: none"> OTEC School system Industry 	4Q, 94

Strategic Area and Key Objectives
Action Steps
Responsibility
Timing
Integrated System

- Provide education and training in an integrated and coordinated way to support continuous learning
- Support ongoing research
- Identify an approach to achieving a sustainable structure in tourism human resources

- Analyze existing learning continuum and delivery/training systems to identify major gaps
- Identify ways to build a sustainable funding base
- Prepare a plan for industry review

- OTEC

4Q, 94

“Making high-return investment in the physical infrastructure.”

Goal: To enhance the physical and information infrastructure required to strengthen Ontario’s position in the world tourism market.

Strategic Area and Key Objectives
Action Steps
Responsibility
Timing
Accessibility

- Improve linkages between modes of transportation
- Improve the transportation linkages between gateways and regions
- Develop Pearson International Airport as a strategic gateway to North America

- Develop a plan for co-ordinating transportation linkages in Ontario
- Develop with industry and government a plan to develop Pearson

- Industry
- Provincial tourism marketing organization
- Regional tourism organizations
- All levels of government

1Q, 94

Strategic Area and Key**Objectives****Action Steps****Responsibility****Timing****Sense of Arrival**

- Improve the border entry process
- Implement comprehensive development plans in gateway communities

- Develop comprehensive gateway development plans for Ottawa, Toronto, Windsor, Niagara Falls
- Identify the gateway potential of: Sarnia, Cornwall, Lansdowne, Fort Frances, Sault Ste. Marie and Fort Erie
- Improve landscaping, signage and information centres in gateway cities
- Develop tourist routes linked to marketing plans and consumer demand

- Federal government
- Provincial tourism marketing organization
- Regional tourism organizations
- Local government

1Q, 95

Information Friendly

- Implement a comprehensive tourism-oriented highway signage system in Ontario
- Expand the network of information centres

- Identify preferred signage system for Ontario
- Encourage government to proceed with pilot projects for strategic corridors
- Prepare Information Centre plan as part of information network

- Local and provincial governments
- Provincial tourism marketing organization

2Q, 94

Facilities

- Support the development of convention and trade show space where commercially viable

- Develop proposals for facilities in Toronto and Ottawa

- Regional tourism organizations
- All levels of government

Ongoing

Access to Capital

- Develop a strategy to facilitate access to capital for infrastructure
- Work with financial institutions to identify growth opportunities

- Analyse existing financial programs available to the industry in Ontario and establish benchmarks against other jurisdictions
- Identify opportunities to improve industry access to capital from traditional and non-traditional sources

- Industry
- Financial institutions
- Provincial government

1Q, 94

“Shaping the policy, regulatory and tax regime.”

Goal: To provide Ontario’s tourism industry with a tax regulatory and policy environment that fosters a competitive, profitable and sustainable industry, thereby retaining existing and generating new investment and growth.

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Tax Issues			
<ul style="list-style-type: none"> Review existing tax regime and assessment procedures Examine comparability of tax system in tourism and other sectors 	<ul style="list-style-type: none"> Conduct comprehensive review of tax issues as they relate to tourism 	<ul style="list-style-type: none"> Industry 	2Q, 94
	<ul style="list-style-type: none"> Conduct comprehensive comparison of Ontario’s industry with other jurisdictions 		
	<ul style="list-style-type: none"> Modify assessment procedures on metro Toronto hotels 	<ul style="list-style-type: none"> Provincial government 	Immediate
	<ul style="list-style-type: none"> Develop enduring resolution of entertainment tax issue 		
Environment			
<ul style="list-style-type: none"> Establish a statement of environmental values for tourism 	<ul style="list-style-type: none"> Conduct an industry forum to identify positions and priorities 	<ul style="list-style-type: none"> Industry Provincial Government 	4Q, 93
Policy Co-ordination			
<ul style="list-style-type: none"> Analyze issues of policy rationalization and co-ordination that affect tourism 	<ul style="list-style-type: none"> Review current policy conflicts and resolution mechanisms 	<ul style="list-style-type: none"> Government 	1Q, 94
<ul style="list-style-type: none"> Establish effective issue resolution mechanisms between MCTR and other ministries 			
Land Use Management			
<ul style="list-style-type: none"> Develop a northern resource-based tourism policy 	<ul style="list-style-type: none"> Establish terms of reference and develop policy for discussion and consultation 	<ul style="list-style-type: none"> Provincial government 	4Q, 94

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Labour Policy			
<ul style="list-style-type: none"> Identify the unique aspects of tourism and the special labour issues this presents 	<ul style="list-style-type: none"> Develop labour position paper Conduct forum to identify priority issues and proposals for resolution 	<ul style="list-style-type: none"> Industry Labour 	4Q, 93
Licensing			
<ul style="list-style-type: none"> Develop quality assurance standards throughout the accommodation sector 	<ul style="list-style-type: none"> Reach agreement among accommodation sector stakeholders on defined standard of quality assurance Prepare position paper on the Tourism Act with respect to licensing 	<ul style="list-style-type: none"> Provincial tourism marketing organization Industry 	2Q, 95

3. ENHANCING THE TOURISM SECTOR IMAGE AND GIVING IT A HIGH PROFILE

Goal: To develop a communications program directed to key audiences to increase awareness of the economic and social importance of the tourism industry.

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Awareness			
<ul style="list-style-type: none"> Conduct baseline research on 'share of mind' awareness Target key audiences Develop long-term awareness-building plan 	<ul style="list-style-type: none"> Carry out 'share of mind' research and set baseline Develop communications plan 	<ul style="list-style-type: none"> Industry Provincial tourism marketing organization 	1Q, 94
Advocacy			
<ul style="list-style-type: none"> Support development of an effective advocacy approach and structure 	<ul style="list-style-type: none"> Ensure that communication needs are thoroughly considered in advocacy organizational planning process 	<ul style="list-style-type: none"> Industry 	1Q, 94

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Economic Importance <ul style="list-style-type: none"> • Heighten awareness of economic importance of tourism 	<ul style="list-style-type: none"> • Develop follow-up communications plan and process to the launch of the Ontario tourism strategy • Develop speakers bureau 	<ul style="list-style-type: none"> • Industry • Provincial tourism marketing organization 	4Q, 93

4. STRENGTHENING KEY INDUSTRY ORGANIZATIONS

GOAL: To establish an organizational structure, reflecting the regional diversity of the province, to co-ordinate the activities of the industry, supported by industry and government.

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
New provincial tourism marketing organization <ul style="list-style-type: none"> • Establish functions and responsibilities • Establish new accountability structure • Move quickly to set up the new organization 	<ul style="list-style-type: none"> • Develop plan and proposal based on the Ontario Tourism Strategy proposals 	<ul style="list-style-type: none"> • MCTR 	2Q, 94
Regional Tourism Organizations <ul style="list-style-type: none"> • Establish functions and responsibilities • Outline relationship with provincial tourism organizations • Develop a flexible accountability structure • Determine approach to implementation 	<ul style="list-style-type: none"> • Develop plan and proposal based on the Ontario Tourism Strategy proposals 	<ul style="list-style-type: none"> • MCTR • Provincial tourism marketing organization • OTEC • new advocacy organization • OTAPs 	3Q, 94

Strategic Area and Key Objectives	Action Steps	Responsibility	Timing
Ontario Tourism Education Council (OTEC)			
<ul style="list-style-type: none"> Examine OTEC's role in context of new Ontario Tourism Strategy Determine long-term stable funding approach Build linkages with other industry organizations 	<ul style="list-style-type: none"> Update existing plans and financial strategies Participate in planning new linkages and co-ordinating mechanisms 	<ul style="list-style-type: none"> OTEC Industry tourism organizations MCTR 	1Q, 94
Single Provincial Tourism Advocacy Organization			
<ul style="list-style-type: none"> Undertake a fundamental review of the role and place of a tourism advocacy organization Establish industry-wide support 	<ul style="list-style-type: none"> Carry out a business planning study around a new advocacy approach and organization 	<ul style="list-style-type: none"> Industry 	2Q, 94
Tourism Council of Ontario			
<ul style="list-style-type: none"> Maintain ongoing attention to implementation of the strategy Achieve strategic co-ordination across the industry structure Look to the future of tourism and raise the key issues for Ontario 	<ul style="list-style-type: none"> Put Tourism Council together and establish the way it will work 	<ul style="list-style-type: none"> MCTR 	4Q, 93
Funding			
<ul style="list-style-type: none"> Secure a stable base of funding for tourism marketing Advance the priority initiatives that are key to the strategy Identify the means to expand industry funding 	<ul style="list-style-type: none"> Prepare a submission to cabinet based on the Ontario Tourism Strategy Develop a new industry funding approach 	<ul style="list-style-type: none"> MCTR 2Q, 94 Industry 	2Q, 94

Appendix A

SELECTED BACKGROUND RESEARCH AND ANALYSIS

ECONOMIC STUDIES AND FRAMEWORKS

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MCTR, Ontario Travel Monitor Survey (1991)

MCTR, Ontario Visitor Trend Analysis (1986, 1989)

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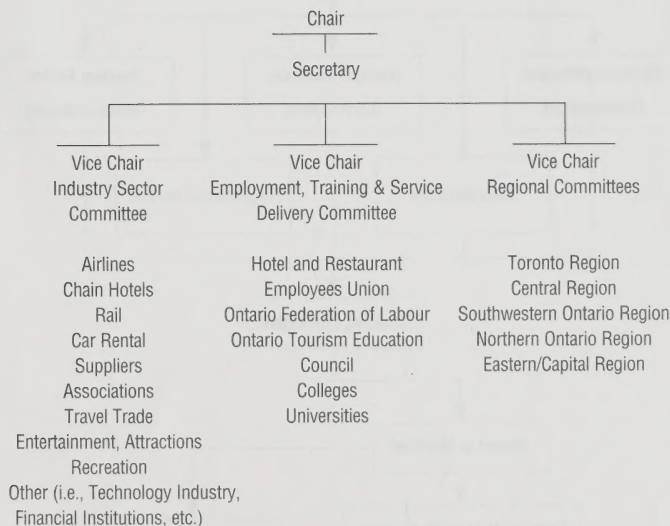
Appendix B

PROCESS OF DEVELOPING THE STRATEGY

IN ORDER TO ENSURE BROAD AND EFFECTIVE REPRESENTATION, a Minister's Advisory Committee was established, reflective of the various subsectors in tourism including the trade associations, labour unions and colleges/universities. Geographic representation was also ensured. Over 500 businesses and organizations were involved in developing the strategy.

The consultation process provided for a number of regional committees to identify geographic concerns as well as working groups to look at specific issues (see diagram).

The Minister's Advisory Committee



The consultation process provided for a number of regional committees to identify broad geographic concerns as well as working groups to look at specific issues (see diagram).

Consultation Partners and Process
 Tourism Strategy Development
 Industry Consultation Process

